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JULY 1985

CCJ

COMMERCIAL CARRIER JOURNAL

TOP 100

CCJ's Exclusive List Of The Nation's Largest For-Hire Carriers

PLUS... Industry Trends And Statistics, and Private Fleet Analysis

ALSO: The Industry's Insurance Crisis: Special Report

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TOUCH TONE SERVICE

This month, CCJ initiates a new service for product information. Called RAPID, the system uses touch tone telephones. Reader service cards have always been popular, but there has always been a delay between the time the card was mailed and the time the information was received. Now that delay has been reduced significantly. By following the instructions on page 56, new product information can be obtained through the use of any touch tone telephone.

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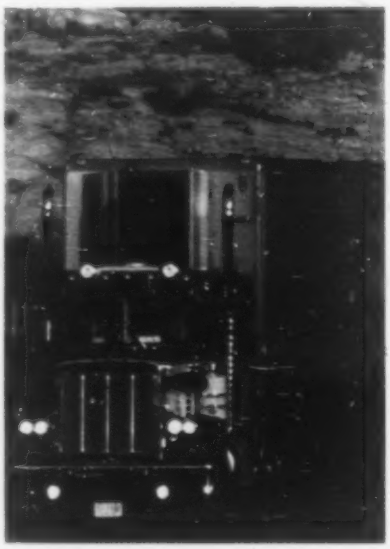

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THE TOP 100

CCJ's exclusive Top 100 takes new shape and form this year. First published in 1969, the Top 100 has been expanded and includes 13 additional items of major interest to observers of the for-hire motor carrier industry. The key to the Top 100 this year is mushrooming revenue but declining profits as expenses outpace income and revenue. But there were some unusually bright stars in the industry last year and all indicators say they are the carriers that bear watching **89**

THE SECOND 100

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EXPENSES: Elusive Key to Profitability

By **CARL GLINES**, *Executive Editor*, and **EILEEN NASE**, *Directories/Special Projects*

Editor's Note: This year, for the first time since 1969 when CCJ originated the listing of the Top 100 for-hire motor carriers, we are using a new source for the financial data. That source is the American Trucking Associations which is under exclusive contract to CCJ for this material. In the past, the data was supplied exclusively to CCJ by Trinc Transportation Consultants of McLean, Va., a subsidiary of Dun & Bradstreet. The decision by the Interstate Commerce Commission to reduce its enforcement requirements covering annual motor carrier reporting made the change necessary. As a consequence, readers may find what appears to be errors in some 1983 rankings as previously reported by CCJ. The inclusion of a few motor carriers by ATA, such as Matadore Service of Wichita, Kan., formerly a private carrier turned common-or some reported by ATA but not previously reported by Trinc, is the reason for the apparent discrepancy. In addition, the 1983 rankings of 13 carriers that previously appeared in CCJ do not appear in the data. They are: Auto Convoy, Dallas, 110; Jones Motor, Spring City, Pa., 103; Cassens Transport, Edwardsville, Ill., 124; New Penn Motor Express, Lebanon, Pa., 101; Kenosha Auto Transportation, Kenosha, Wis., 119; Southwest Motor Freight, Chattanooga, 109; Janesville Auto Transit, Bloomfield Hills, Mich., 106; Melton Truck Lines, Shreveport, La., 116; Estes Express Lines, Richmond, Va., 108; Pre-Fab Transit, Farmer City, Ill., 105; Duff Truck Line, Lima, Ohio, 102; Jack Cooper Transportation of Kansas City, 154; and Miller Transporters, Jackson, Miss., 104. A 14th carrier, Dallas & Mavis of Kenosha, Wis., did not appear in CCJ's Top 100 last year so we have no previous ranking. Other carriers reported by ATA this year, but which did not appear in the 1984 issue of the Top 100, are Builders Transport, Camden, S.C., and Western Express, Austell, Ga. In addition, there are 13 new categories of data in the first expansion of the Top 100 in many years. The new categories are: net profit margin, return on equity, current ratio of assets to liabilities and long-term debt to equity ratio. Under the general category of maintenance, we have added statistics on fuel costs, lubricants and coolants, parts repair and maintenance purchasing, coupled with three new categories under the general heading of insurance expenses. Finally, there is a new category called linehaul costs by mile.

The shakeout of the for-hire segment of America's trucking industry continued in 1984 with a vengeance. That's one obvious conclusion that has to be drawn from a statistical analysis of the 1984 financial data of the nation's Top 200 for-hire motor carriers.

Another observation is that

Continued

The Top 100, Trends & Statistics and Private Fleets are available in a 34-page booklet for $5. Write: Reprint Editor, Commercial Carrier Journal, Chilton Way, Radnor, Pa. 19089.

while gross revenues continue to climb —a record $24.6 billion for the 1984 Top 100—the increase in net income after taxes—$782,831,000 —is clearly not keeping pace. The reason is the continuing escalation of expenses that lowers carriers' profit margins. Industry sources attribute these increase to higher state and federal taxes, increased user fees and equipment costs. Industry sources say this is a serious problem that needs to be addressed, but there are no foreseeable solutions.

There is, perhaps, no better example of what's happened to carriers than to look at the track record of the top five: United Parcel Service of St. Charles, Ill.; UPS of New York; Roadway Express of Akron, Ohio; Yellow Freight of Overland Park, Kan.; Consolidated Freightways of Portland, Ore. While all but Yellow reported increases in 1984 in gross revenues, only Consolidated Freightways reported an increase in net income. United Parcel Service of St. Charles, always a pacesetter in the revenue and income departments, reported a significant decline of $32.5 million for 1984 over 1983. At the same time, UPS' expenses jumped $518.7 million. And that, in essence, tells the industry's story for 1984.

The pattern set by the top five is not unique, but rather is reflected by the performance of all carriers in the Top 100. And in the second 100, as well.

For example, in 1984, 86 carriers reported increases in gross revenue, but only 58 reported increases in net income. That's almost a two-for-one ratio. Nine companies reported decreases in revenues while 37 reported declines in their net income. (Note: In many cases, the figures will not total 100 or 100% because of the changes in the reporting source.)

Without a doubt, there is no better evidence of an industry going through turmoil and change, as dictated by the deregulation of trucking, than in the list of carriers no longer in business because of bankruptcy, acquisition or liquidation. The list is heavily tilted in favor of some old and well-known carriers. It includes Lee Way Motor Freight of Oklahoma City, acquired by Commercial Lovelace, which is now known as CL Motor Freight, Columbus, Ohio; Mason & Dixon Lines of Kingsport, Tenn., acquired by Central Transport; Branch Motor Express of New York; Salt Creek Freightways of Casper, Wyo., currently in Chapter 11; Briggs Transportation Co. of St. Paul; and IML of Salt Lake City, which was closed when it was unable to renegotiate new labor terms with the International Brotherhood of Teamsters. This list is far from complete, however, but it does accurately reflect the changing face of trucking.

The 1984 figures indicate also that the process of change is far from complete, as a number of well-known carriers remain on the financial tightropes. One such carrier is Ryder/P.I.E. Nationwide of Jacksonville, Fla., a subsidiary of IU International of Philadelphia, Pa. Created out of the merger of P.I.E. of Walnut Creek, Calif., with the Jacksonville operation, success of the surviving operating unit continues to elude IU and Ryder officials.

In 1984, the company reported a decrease of nearly $110 million in revenue to $890,747, from $1.1 billion in 1983. The bottom line is that Ryder lost $19.6 million, reporting a negative net profit margin of 2.2%. And the loss continues. IU said Ryder lost another $11.9 million in the first quarter of 1985, and IU was seeking recommendations from the First Boston Corp., over the feasibility of restructuring the company. Ryder also announced earlier that it will be changing its name sometime in the next 10 months. IU also owns Poole Truck Line of Evergreen, Ala., which was ranked 77 in 1983, but was granted an exception from reporting this year. Consequently, the company does not appear in 1984's Top 200. Helms/Byrns Express, an integrated operation headquartered in Irwin, Pa., is also owned by IU.

Other well-known carriers who reported losses last year include McLean Trucking of Winston-Salem, N.C. McLean is a subsidiary of Meridian Express of Dallas, which also operates Alamo Express of San Antonio; Delta Lines of Oakland, Calif.; Merchants Fast Motor Lines of Abilene, Texas; and The Express Co., of Salt Lake City. Meridian Express is, in turn, owned by Wedge International of the Netherlands. The company announced about a year ago that it had obtained $100 million in combined loan facilities for its companies. The loan was floated by the Texas Commerce Bank, CitiBank of New York, Union Bank of Oakland and Mercantile National of Dallas.

McLean's losses amounted to $898,000 on revenues of $487 million. While not large, the loss is a setback to the company's recovery

Text continues on page 97

Footnotes:
For the Top 100 listings under "Type:" BM—Building Materials; CM—Common; CT—Contracts; GF—General Freight; ED—Explosives/Dangerous Articles; FP—Forest Products; HG—Household Goods; HM—Heavy Machinery; LP—Liquid Petroleum Products (including, in most cases, other bulk commodities); MV—Motor Vehicles; RS—Retail Store Delivery; SC—Specific Commodity (not otherwise grouped).

While UPS files individually for New York and Illinois, under the category miles operated and shipments handled, the figures are consolidated.

At press time, Mushroom Transportation of Philadelphia, Pa., a family-owned 50-year-old trucking enterprise, had filed for protection under Chapter 11 of the Federal Bankruptcy Act. Mushroom said the move was brought about by the increase in the company's insurance premiums to $1.7 million this year from $700,000 although the company's incurred losses did not increase. Mushroom said no immediate layoffs are planned and the company expects to continue operating.

TOP 100

Rank '84	Rank '83	Fleet Name, City, State	Type	Financial Data (x000) Gross Revenue	Expenses	Net Income After Taxes	Net Profit Margin	Return on Equity	Current Ratio (Assets: Liabilities)	Long Term Debt to Equity Ratio
1	1	UNITED PARCEL SVC INC, ST CHARLES, IL	CMGF	$4453462	$3985994	$250980	5.6	42.7	1.27	0.00
2	2	UNITED PARCEL SVC INC NY, NEW YORK, NY	CMGF	1742512	1650514	49206	2.8	18.8	1.93	0.43
3	3	ROADWAY EXPRESS INC, AKRON, OH	CMGF	1400907	1267061	98283	7.0	13.6	0.81	0.00
4	5	YELLOW FREIGHT SYSTEM INC, OVERLAND PARK, KS	CMGF	1344334	1274884	41240	3.1	14.5	0.79	0.42
5	4	CONSL FRTWYS CORP OF DEL, PORTLAND, OR	CMGF	1283706	1190537	62094	4.8	13.4	1.08	0.12
11	11	CAROLINA FRT CRRS CORP, CHERRYVILLE, NC	CMGF	373256	347697	13160	3.5	23.0	1.51	0.73
12	13	ALLIED VAN LINES INC, CHICAGO, IL	CMHG	353877	346567	7761	2.2	18.5	1.11	0.05
13	16	UNITED VAN LINES INC, FENTON, MO	CMHG	339191	340173	2891	0.9	4.3	1.16	0.15
14	12	SMITH S TRANSFER CORP, STAUNTON, VA	CMGF	335133	329618	3257	1.0	8.5	1.12	1.03
15	14	TRANSCON LINES, EL SEGUNDO, CA	CMGF	326478	306871	8731	2.7	13.6	1.50	0.56
21	20	COMPLETE AUTO TRANSIT INC, BLOOMFIELD HILLS, MI	CTMV	246934	224243	11627	4.7	25.7	0.51	0.00
22	22	ST JOHNSBURY TRKG CO INC, HOUSTON, MN	CMGF	232306	218326	7186	3.1	18.8	1.55	0.33
23	23	SIGNAL DELV SERVICE INC, DOWNERS GROVE, IL	CTRS	221723	209144	9335	4.2	19.3	0.79	0.34
24	28	MATLACK INC, LANSDOWNE, PA	CMLP	209065	200382	2718	1.3	6.4	1.46	1.73
25	26	PILOT FREIGHT CARRIERS INC, WINSTON-SALEM, NC	CMGF	208412	218477	11976	5.7	131.5	1.11	2.73
31	32	GARRETT FREIGHTLINES INC, UTAH, CO	CMGF	173858	178043	6437	3.7	26.5	1.33	0.48
32	35	BROWN TRANSPORT CORP, ELBERTON, GA	CMGF	171534	166725	1862	1.1	15.7	1.26	2.56
33	39	COMMERCIAL CARRIERS INC, SOUTHFIELD, MI	CMMV	167911	158683	4400	2.6	15.7	0.97	0.00
34	40	ATLAS VAN LINES INC, EVANSVILLE, IN	CMHG	161003	157615	2890	1.8	12.3	0.45	2.35
35	37	BOWMAN TRSPTN INC, ATLANTA, GA	CMGF	158628	155737	4082	2.6	7.9	1.92	0.05
41	41	OLD DOMINION FRT LINE INC, HIGH POINT, NC	CMGF	127354	127004	1658	1.3	14.1	1.27	3.44
42	42	WATKINS MOTOR LINES INC, LAKELAND, FL	CMGF	115231	110358	2284	2.0	16.4	2.34	0.20
43	51	NU-CAR CARRIERS, BRYN MAWR, PA	CMMV	113353	105369	3578	3.2	39.9	1.11	1.21
44	47	THURSTON MOTOR LINES INC, CHARLOTTE, NC	CMGF	111475	109406	1200	1.1	4.4	1.24	0.66
45	45	TRI STATE MTR TRANSIT CO, JOPLIN, MO	CMHM	109631	108549	508	0.5	1.4	1.56	0.40

TOTAL TOP 50—1984	$20,936,173	$19,750,700	$677,193	
TOTAL TOP 50—1983	19,110,720	17,860,772	695,320	
TOTAL TOP 50—1982	17,217,317	16,594,618	320,563	

Equipment Owned & Leased						Maintenance Expenses (x000)							Insurance Expenses (x000)		
Trucks	Truck-Tractors	Trailers	Total Owned	Vehicles Leased or Rented	Ave No. Maint. Employs.	Tires & Tubes	Fuel	Lubes & Coolant	Repair Parts	Purch. Maint.	Other	Maint. Total	Public Liab. & Prop. Damage	Cargo Loss & Damage	Fire Theft & Coll
28087	4404	17707	50198	130	3106	$28607	$115610	$3407	$72826	$31906	$71464	$323820	$15141	$37241	$46
10926	1774	4908	17608	173	1249	8614	38548	1239	27761	10986	34997	122145	6085	25629	18
880	7745	18923	27548	4	751	6933	79176	1382	17667	19486	26576	151220	8126	18812	32
468	706	21048	28584	361	1147	12252	79956	1856	19386	10765	30382	154597	9119	25202	26
199	6728	19541	26468	190	705	9883	72478	1520	19372	10100	24359	137712	5444	20219	5392
151	2090	5239	7480	171	390	3898	18497	626	5893	3365	6269	38548	2384	3474	60
0	31	285	316	6171	6	203	0	NA	0	533	242	978	106	0	29
0	0	158	158	4957	683	104	0	NA	0	221	363	687	0	72	0
266	2215	4202	6683	262	294	3328	21226	564	4101	1379	3540	34127	1579	2946	131
134	1657	4451	6242	0	257	2680	20797	543	6889	4582	6459	41949	2074	4533	563
2012	0	2028	4040	3	193	4713	22591	485	8366	5046	8578	49778	2292	4152	29
0	198	135	333	1716	139	2040	9644	383	2236	1883	4298	20484	1202	2514	0
911	1586	7477	9274	0	228	5765	19115	361	4254	2570	1666	33731	2397	2	391
93	1004	3703	4800	637	164	4856	15289	378	4233	4046	8879	37681	4642	360	0
57	809	2509	3375	726	155	1905	11163	371	3234	2783	3542	22897	1780	2363	4
129	1032	2656	3817	82	0	1504	10401	338	1338	2226	2053	19858	655	1750	213
284	1174	2419	3877	0	112	1382	8257	331	3147	1505	2425	17048	967	1457	27
0	1476	1746	3222	168	171	2985	14560	561	6111	4968	3611	32796	1591	4718	0
0	2	96	98	2924	0	113	4	NA	0	290	224	631	1488	4087	16
240	1094	3301	4635	268	195	2080	11138	315	2853	1463	2296	20145	1414	1659	0
20	727	2717	3464	233	126	2082	7533	362	2672	1063	3862	17574	1727	1798	2
20	219	115	354	341	81	1197	3140	95	972	1247	1464	8085	1689	1031	178
0	758	879	1637	107	104	1857	8424	163	3537	3002	3177	20160	926	4823	8
302	691	2619	3612	91	186	1846	9019	266	3803	603	1793	16530	1231	1722	14
33	336	2069	2438	566	124	1478	2154	126	1970	482	3536	9746	3116	1029	521

Vehicle Mileage (x000)				Ave. Haul (Miles)	Linehaul Cost/Mi	Tons Carried (000)		Shipments Number (000)		Ave. Load (Tons)	1984 Oper. Ratio	1983 Oper. Ratio	Rank By Oper. Ratio	Abbr. Fleet Name
Owned	Leased With Driver	Leased Without Driver	Inter Modal			TL	LTL	TL	LTL					
1188153	0	81126	0	0	2.65		10796		1847290	0.0	89.5	86.9	12	UPS-ILL
											94.7	90.5	36	UPS-NY
427014	16176	0	20415	1109	1.12	1879	3960	169	11070	13.9	90.4	89.6	16	ROADWAY
426005	21960	20000	3280	1124	1.08	2094	3765	172	10283	14.0	94.8	92.6	38	YELLOW
393318	14383	1118	30420	1494	1.21	1481	3554	145	8657	16.1	92.7	91.5	23	CONSL FRTWYS
97661	9421	318	14941	696	1.19	973	1298	72	2918	12.1	93.2	93.0	25	CAROLINA
0	183154	0	0	976	1.95	581	NA	266	NA	4.3	97.9	98.9	64	ALLIED VAN
0	114781	0	0	1109	2.09	551	NA	218	NA	5.3	100.3	100.1	85	UNITED VAN
116564	0	0	5807	747	1.04	853	1258	78	8340	13.1	98.4	97.4	70	SMITH'S TRF
105358	33823	0	1538	1256	1.03	1107	727	87	1686	16.4	94.0	96.7	31	TRANSCON
113035	9414	0	0	999	1.58	2861	NA	NA	NA	9.8	90.8	90.9	19	COMPLETE AUTO
0	8045	35786	0	168	1.44	998	1019	70	6019	8.6	94.0	94.1	36	ST JOHNSBURY
111477	0	0	0	68	1.59	2938	NA	NA	NA	8.9	94.3	93.9	33	SIGNAL DLVY
84594	28771	5341	0	170	1.51	8996	NA	NA	NA	13.0	95.8	96.7	44	MATLACK
57021	2945	11170	3423	500	1.14	1007	603	77	1685	12.7	104.8	104.3	96	PILOT
49109	0	0	3799	662	1.28	512	697	38	2058	14.7	107.4	94.7	90	GARRETT
38571	39693	0	0	490	0.97	1760	670	121	1849	13.7	97.3	97.9	57	BROWN
68059	7202	2720	0	166	1.78	2742	NA	NA	NA	5.8	94.5	94.3	35	COMMERCIAL
150	57815	0	0	1020	1.97	290	NA	107	NA	4.9	97.4	96.4	63	ATLAS
56090	19803	0	952	647	0.95	1175	1507	75	1221	14.2	98.7	99.2	66	BOWMAN
37900	29226	804	0	519	0.99	1731	469	77	908	13.0	99.7	97.7	81	OLD DOMINION
14821	45888	0	0	1546	0.79	493	NA	NA	NA	12.6	95.8	92.2	43	WATKINS
35125	0	6185	0	160	2.08	2116	NA	NA	NA	8.2	93.0	96.4	24	NU-CAR
44147	4705	0	0	415	0.91	812	477	58	1147	10.9	98.1	94.9	65	THORSTON
10660	80979	0	0	1151	0.98	935	NA	NA	NA	11.7	99.0	96.2	77	TRI-STATE

TOP 100

Rank '84	Rank '83	Fleet Name, City, State	Type	Financial Data (x000) Gross Revenue	Expenses	Net Income After Taxes	Net Profit Margin	Return on Equity	Current Ratio (Assets: Liabilities)	Long Term Debt to Equity Ratio
51	50	RED STAR EXP LNS AUBURN INC, AUBURN, NY	CMGF	$97716	$88098	$4378	4.5	16.3	1.45	0.69
52	53	MURPHY MTR FRT LNS INC, ST PAUL, MN	CMGF	96731	96833	822	0.9	11.6	0.97	0.92
53	52	TRANSUS INC, ATLANTA, GA	CMGF	96081	91368	3702	3.9	14.1	2.37	0.04
54	54	MERCHANTS FAST MTR LINES, ABILENE, TX	CMGF	95160	90165	2002	2.1	16.7	1.99	0.00
55	67	THE MOTOR CONVOY INC, DECATUR, GA	CMMV	92977	90282	2376	2.6	51.2	1.13	1.45
61	63	CHURCHILL TRUCK LINES INC, CHILLICOTHE, MO	CMGF	84898	79991	2624	3.1	18.8	1.25	0.32
62	76	OVERLAND EXPRESS INC, BLAINE, MN	CMGF	83793	75506	761	0.9	4.0	0.66	2.47
63	95	N T C OF AMERICA INC, TULSA, OK	CMSC	83101	82627	300	0.4	6.9	1.97	3.16
64	71	NORTHWEST TRPT SVC INC, COMMERCE CITY, CO	CMGF	82811	71740	6300	7.6	25.0	0.81	0.88
65	61	GLOBAL VAN LINES INC, ANAHEIM, CA	CMHG	82724	79915	1324	1.6	12.2	1.04	0.73
71	99	BURNHAM SERVICE CO INC, COLUMBUS, GA	CMHG	76411	68424	4860	6.4	24.0	1.09	0.25
72	72	MISTLETOE EXPRESS SERVICE, OKLAHOMA CITY, OK	CMGF	75034	74282	486	0.6	4.6	0.92	1.18
73	78	CRETE CARRIER CORP, LINCOLN, NE	CMGF	74096	69307	3284	4.4	22.8	2.96	0.00
74	70	SYSTEM 99, OAKLAND, CA	CMGF	72193	73439	2891	4.0	N.V.	0.65	N.V.
75	74	INTERSTATE CONT CARR CORP, SALT LAKE CITY, UT	CMGF	71719	76912	1565	2.2	8.4	0.74	0.37
81	84	ADVANCE TRANSPORTATION CO, MILWAUKEE, WI	CMGF	66881	67152	1280	1.9	45.1	0.73	2.24
82	91	JONES TRANSFER COMPANY, MONROE, MI	CMGF	66708	61577	2745	4.1	22.3	1.09	0.58
83	83	AAA COOPER TRPTN, DOTHAN, AL	CMGF	66414	59065	3641	5.5	22.3	1.29	0.46
84	*	NEW PENN MTR EXPRESS INC, LEBANON, PA	CMGF	65746	55059	6641	10.1	16.4	1.70	0.04
85	*	MATADOR SERVICE INC, WICHITA, KS	CMGF	64667	53225	5279	8.2	19.9	3.28	0.00
91	*	SOUTHWEST MOTOR FREIGHT, CHATTANOOGA, TN	CMGF	59850	57575	518	0.9	23.5	0.42	6.36
92	98	ONEIDA MOTOR FREIGHT INC, CARLSTADT, NJ	CMGF	59565	59411	616	1.0	0.0	1.18	0.73
93	*	JANESVILLE AUTO TRPT CO, BLOOMFIELD HILLS, MI	CTMV	59434	53925	3338	5.6	22.8	0.67	0.00
94	*	MELTON TRUCK LINES INC, SHREVEPORT, LA	CMBM	59099	58034	1085	1.8	9.6	4.31	0.32
95	*	ESTES EXPRESS LINES, RICHMOND, VA	CMGF	58968	51364	4484	7.6	24.1	1.92	0.11
		TOTAL TOP 100—1984		$24,613,472	$23,266,398	$782,831				
		TOTAL TOP 100—1983		22,584,324	21,192,330	765,075				
		TOTAL TOP 100—1982		20,552,906	19,875,822	329,945				

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Equipment Owned & Leased					Ave No. Maint. Emplys.	Maintenance Expenses (x000)							Insurance Expenses (x000)		
Trucks	Truck-Tractors	Trailers	Total Owned	Vehicles Leased or Rented		Tires & Tubes	Fuel	Lubes & Coolant	Repair Parts	Purch. Maint.	Other	Maint. Total	Public Liab. & Prop. Damage	Cargo Loss & Damage	Fire Theft & Coll
37	646	1133	1816	0	83	$975	$4646	$84	$1680	$860	$2583	$10827	$744	$735	$17
14	466	1447	1927	0	40	542	4297	127	956	349	1571	7842	280	1080	24
106	608	1477	2191	230	61	1076	3845	136	2108	1351	1464	9980	738	1269	34
0	0	0	0	0	65	1316	5981	182	1126	1521	639	10765	791	869	0
0	83	57	140	582	72	1785	8083	276	2185	1641	2033	16002	1915	3329	0
59	621	1232	1912	0	60	1113	5378	134	1920	2617	1239	12401	336	760	2
0	428	1804	2232	824	49	2028	9585	195	1143	134	463	13547	761	385	0
0	50	329	379	1165	0	706	1288	0	252	496	9026	11768	1137	1735	73
0	0	0	0	494	31	524	4053	123	655	1482	990	7827	247	417	329
0	9	35	44	581	0	255	0	NA	0	757	4	1016	273	110	2
158	173	427	758	512	10	808	4313	NA	3	2582	741	8447	610	155	130
379	239	665	1283	0	51	646	2748	63	922	623	752	5755	607	1946	3
0	1	473	474	780	24	839	30	0	405	147	423	1844	636	232	234
73	469	1226	1768	0	25	929	4454	115	1146	187	948	7779	887	742	28
0	4	185	189	804	35	883	81	9	554	1	2352	3881	2532	752	73
12	192	640	844	270	42	237	2612	71	735	825	796	5316	493	1054	110
12	452	2101	2565	30	68	925	3669	116	1825	811	1232	8578	327	127	26
54	360	860	1274	79	55	1721	3530	117	858	289	453	6469	614	535	139
30	345	987	1362	54	60	916	2983	86	1466	670	1295	7417	479	518	0
471	0	497	968	24	0	1756	6081	388	4997	0	614	13836	24	24	24
0	372	947	1319	219	62	689	9540	325	787	2785	3590	17717	83	271	1474
122	457	834	1413	0	83	365	3412	182	1758	320	1536	7574	424	645	131
0	490	487	977	0	77	741	4784	119	2001	521	1281	9449	381	757	0
4	0	730	734	546	8	819	739	2	256	858	422	3097	1101	426	10
77	598	1413	2088	0	87	1029	4331	128	1329	125	689	7631	468	402	20

Vehicle Mileage (x000)				Ave. Haul (Miles)	Linehaul Cost/Mi	Tons Carried (000)		Shipments Number (000)		Ave. Load (Tons)	1984 Oper. Ratio	1983 Oper. Ratio	Rank By Oper. Ratio	Abbr. Fleet Name
Owned	Leased With Driver	Leased Without Driver	Inter Modal			TL	LTL	TL	LTL					
14581	53	0	0	300	1.30	226	390	20	1094	12.6	90.2	90.2	15	RED STAR EXP
23161	4745	3296	2096	589	1.10	374	367	27	852	13.1	100.1	99.5	84	MURPHY
15240	21214	0	4946	409	0.90	430	451	33	1192	7.3	95.1	93.8	39	TRANSUS
0	0	28606	0	346	1.12	498	500	31	1330	12.1	94.8	95.4	37	MERCHANTS
300	0	90227	0	140	0.79	3535	NA	NA	NA	5.5	97.1	98.8	56	MOTOR CONVOY
22609	737	0	1436	484	1.20	223	354	19	764	11.0	94.7	93.6	32	CHURCHILL
43884	27257	0	0	94	0.86	11339	NA	NA	NA	15.0	90.1	93.8	14	OVERLAND
0	65898	0	0	560	0.94	1228	NA	NA	NA	9.4	99.4	96.4	80	N.T.C.
0	1581	21654	992	920	1.16	183	226	14	583	15.4	86.6	87.0	7	NORTHWEST
0	32098	0	0	638	1.75	188	NA	55	NA	3.7	96.6	97.5	52	GLOBAL VAN
7085	11132	0	0	1133	2.06	110	NA	45	NA	6.8	89.5	89.9	13	BURNHAM
11013	5941	0	0	0	0.93	0	724	0	6393	0.0	99.0	98.3	76	MISTLETOE
0	74647	0	0	1145	0.89	1304	NA	NA	NA	20.0	93.5	94.7	27	CRETE
11313	0	10566	0	576	0.96	153	292	14	756	11.7	101.7	95.6	88	SYSTEM 99
0	79714	0	0	1175	0.79	884	NA	NA	NA	13.0	107.2	103.0	100	INTERSTATE CONT
3111	336	12596	0	204	1.31	370	373	27	815	9.4	100.4	98.5	86	ADVANCE
17498	1250	1421	0	131	1.09	1035	330	81	461	8.8	92.3	94.7	21	JONES TRANSFER
17002	1078	0	1556	265	0.97	234	382	19	930	8.1	88.9	89.7	9	AAA COOPER
15186	0	0	0	229	1.14	221	348	20	748	8.6	83.7	83.2	4	NEW PENN
29148	0	0	0	0	0.00	0	NA	NA	NA	0.0	82.3		3	MATADOR
40664	11769	1062	0	0	0.95	526	NA	NA	NA	0.0	96.2	94.7	50	SOUTHWEST
11021	1244	0	0	263	1.11	240	217	18	576	9.8	99.7	98.7	82	ONEIDA
23746	6984	0	0	364	1.41	988	NA	NA	NA	17.7	90.7	90.6	18	JANESVILLE
3257	48246	0	0	432	0.99	1429	NA	NA	NA	12.0	98.2	98.5	67	MELTON
14836	0	0	0	190	0.95	336	419	25	1099	9.7	87.1	89.7	8	ESTES

process which began in 1983. In that year, McLean earned $1.7 million as opposed to a loss of $17 million in 1982. Another Meridian company which is not listed for the second year is Delta Lines. Delta reported losing $513,000 in 1982, and a company official told CCJ Delta had a "disastrous year in 1983." The company's performance last year is unknown.

By contrast, another Meridian company, Merchants Fast Motor Lines reported income of $2 million. In 1983, Merchants earned $1.68 million, operating in the tough Texas market dominated by the nation's largest intrastate carrier, Central Freight Lines of Waco.

Other big losers in 1984 include Smith's Transfer Corp. of Staunton, Va., once owned by Jake Smith and family. Like McLean, Smith's recovery process was set back last year. Now operated by ARA of Philadelphia, Pa., Smith's reported a loss of $3.2 million. The company also lost $3 million in 1982, but returned to profitability—$3.8 million—in 1983. For the first quarter of 1985, however, Smith's operating ratio slipped to 102 from 98.4. ARA is one of the nation's largest food service companies, if not the largest, and operates, besides Smith's Transfer, Cooper Motor Lines of Greenville, S.C., an owner operator carrier hauling truck load freight.

In addition to Ryder/P.I.E. Nationwide, McLean and Smith's, four other carriers who made money in 1983 reported losses for 1984. They are Central Transport of Sterling Heights, Mich.; Garrett Freightlines of Utah, Colo.; Old Dominion of High Point, N.C.; and Thurston Motor Lines of Charlotte, N.C.

For-hire carriers who have yet to get a handle on their bottom line include Pilot Freight Carriers of Winston-Salem, N.C.; Associated Truck of Denver; Hall's Motor Transit of Mechanicsburg, Pa.; Chemical Leaman of Lionville, Pa.; and Midwestern Distribution of Ft. Scott, Kan. Of these five, only Chemical Leaman, a major tank truck operator, was able to reduce its loss. It declined to $614,000 from $1.8 million in '83. Associated had the biggest increase in its loss, to $12.5 million from $2.5 million. But of the 12 carriers in the Top 50 category that lost money, Ryder/P.I.E. Nationwide had by far the largest single loss, $19.6 million. That was followed by Associated and then Garrett Freightlines' $6.4 million deficit. In the first quarter of 1985, Associated's operating ratio was reported at 110; and Pilot and Hall's at 111 each, indicating that both carriers were still losing substantial sums. Pilot is a subsidiary of TNT Transport, operated by Sydney, Australia-based Thomas Nationwide Transport, Ltd. Other TNT carriers include Holland Motor Express and Transall Inc. TNT also just announced the acquisition of Best-Way Transportation of Phoenix, founded by John Pifer. The sale price was not disclosed.

In the 51 to 100 category, there were 11 more losers, including Murphy Motor Freight of St. Paul and Campbell Sixty-Six of Springfield, Mo. Whether by coincidence or for some other reason, the final three carriers in the Top 100 also all lost money. They are Duff Truck of Lima, Ohio; Miller Transporters of Jackson, Miss.; and CL Motor Freight. CL acquired Lee Way in 1984 from PepsiCo Inc. The acquisition was originally planned to allow CL to go nationwide, taking advantage of the deregulatory process. But CL failed to get Teamster cooperation in reducing Lee Way's high labor costs, so the long-time carrier was shut down.

Duff reported the largest negative return on equity of any Top 100 carrier, 141.9, followed by Pilot Freight, 131.5.

On the plus side, the front runners last year appear to be a couple of little unknowns, who have rapidly been cutting themselves in for more and more of the profitable traffic, much of it truckload. They are J.B. Hunt of Lowell, Ark.; Builders Transport of Camden, S.C.; and Churchill Truck Lines of Chillicothe, Mo.

Hunt is classified as a special commodities carrier; Churchill a general freight operator; and Builders Transport, a building supply carrier. But those classifications seem only vague and meaningless terms in light of the financial success this trio has had since deregulation.

The success story of the year has to be J.B. Hunt, who this year broke into the Top 50 for the first time. The company is now ranked 49th. It was ranked 80 in 1983 and 129 in 1982. That's an impressive upward movement by any measurement. Last year, Hunt earned $14.1 million on revenues of $97.9 million. And the company had the industry's best operating ratio, again, an envious 79.1. That was even better than the previous year when it was also the nation's standard and best, at 85. In just a two-year period, using almost all company drivers, Hunt has more than doubled revenues, while sustaining a better then 300% increase in net income.

Builders classifies itself as an irregular route truckload carrier, earning $4.1 million in 1984 on revenues of $79 million. It was ranked 66 in 1984. In previous reports on the Top 100, Builders Transport was rarely mentioned, and in fact did not even appear in the 1982 Top 200. Builders president J.L. Phipps announced last October the company was acquiring Newman Bros. of Ft. Worth, giving it greater access to the Texas market, usually a difficult area to penetrate because of the conservative and provincial policies of the Texas Railroad Commission which regulates intrastate trucking.

Churchill Truck Lines continues to inch its way steadily upward. In 1982 it was ranked 81; in 1983, 66; and for 1984, it is 61.

Text continues on page 102

Rank '84	Fleet Name, City, State	Type	Financial Data ($000)			1984 Oper. Ratio	1983 Oper. Ratio
			Gross Revenue	Expenses	Net Income After Taxes		
101	SAIA MOTOR FRT LINE INC, HOUMA, LA	CMGF	$56306	$47111	$5663	83.7	86.4
102	SCHWERMAN TRUCKING CO, MILWAUKEE, WI	CMSC	55449	52843	2367	95.3	97.6
103	COASTAL TANK LINES INC, AKRON, OH	CMLP	55136	59560	7028	108.0	100.9
104	DART TRANSIT COMPANY, ST PAUL, MN	CMGF	53918	50998	1757	94.6	92.6
105	HOLMES TRANSPORTATION INC, FRAMINGHAM, MA	CMGF	53642	54900	569	102.3	100.0
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
111	RED ARROW FRT LNS INC, SAN ANTONIO, TX	CMGF	52155	50943	515	97.7	100.7
112	CONTRACT FREIGHTERS INC, JOPLIN, MO	CMSC	51957	47402	3582	91.2	90.1
113	BN TRANSPORT INC, WICHITA, KS	CMGF	50196	56872	6121	113.3	106.5
114	D P D INC, MIAMI, FL	CTSC	49380	48372	525	98.0	94.7
115	MERCER TRANSPORTATION CO, LOUISVILLE, KY	CMBM	49243	46868	1192	95.2	97.1
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
121	HYMAN FREIGHTWAYS INC, ST PAUL, MN	CMGF	47376	46412	610	98.0	95.2
122	WHITEFORD TRUCK LINES INC, SOUTH BEND, IN	CMGF	46785	46743	1929	99.9	94.8
123	DEATON INC, BIRMINGHAM, AL	CMSC	46194	40931	2456	88.6	91.2
124	MIDWEST EMERY FRT SYS INC, BURBANK, IL	CMRC	45842	45541	409	99.3	102.3
125	DSI TRANSPORTS INC, HOUSTON, TX	CMSC	45793	41681	2254	91.0	95.2
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
131	SOUTHWESTERN MTR TRPT INC, SAN ANTONIO, TX	CMGF	44081	40274	2199	91.4	99.2
132	LYNDEN TRANSPORT INC, SEATTLE, WA	CMGF	43975	42882	602	97.5	91.6
133	SANTA FE TRAIL TRPTN CO, WICHITA, KS	CMGF	43631	49507	3279	113.5	104.5
134	CROUSE CARTAGE CO, CARROLL, IA	CMGF	43477	42608	558	98.0	96.9
135	SANBORN'S MOTOR EXP INC, PORTLAND, ME	CMGF	43381	43143	313	99.5	96.1
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
141	FLEET TRANSPORT CO INC, CLEVELAND, OH	CMLP	40959	42070	1067	102.7	100.2
142	BIRD TRUCKING CO INC, WAUPUN, WI	CMSC	40742	38162	367	93.7	92.2
143	NORTH PENN TRANSFER INC, LANSDALE, PA	CMGF	40607	41986	1174	103.4	96.2
144	ECK MILLER TRPTN CORP, ROCKPORT, IN	CMHM	40304	39371	790	97.7	97.0
145	K L M INC, JACKSON, MS	CMGF	40159	37298	1793	92.9	94.0
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Rank '84	Fleet Name, City, State	Type	Financial Data (x000)			1984 Oprr. Ratio	1983 Oper. Ratio
			Gross Revenue	Expenses	Net Income After Taxes		
151	FREDRICKSON MTR EXP CORP, CHARLOTTE, NC	CMGF	$38781	$37246	$405	96.0	93.8
152	WARREN TRANSPORT INC, WATERLOO, IA	CMHM	38616	35707	2049	92.5	93.3
153	G I TRUCKING CO, LA MIRADA, CA	CMGF	38225	39440	1142-	103.2	102.7
154	INTERMODAL TRPTN SVC INC, CINCINNATI, OH	CMGF	38176	37822	309	99.1	102.4
155	BLUE RIDGE TRF CO INC, ROANOKE, VA	CMSC	37611	35868	775	95.4	95.2
156	DISTRIBUTION SVC SYS, CHARLOTTE, NC	CMSC	37444	37605	49	100.4	100.4
157	HADLEY AUTO TRANSPORT, SANTA ANA, CA	CMV	37433	35194	1050	94.0	94.7
158	NATIONWIDE CARRIERS INC, MAPLE PLAIN, MN	CMRC	37413	37609	485	100.5	96.7
159	THE WAGGONERS TRUCKING, BILLINGS, MT	CMGF	37286	35272	1761	94.6	97.8
160	RUAN TRANSPORT CORP, DES MOINES, IA	CMLP	36966	36497	192	98.7	101.5
161	GEORGE TRF INC, PARKTON, MD	CMSC	36550	35814	498	98.0	97.2
162	SAUNDERS CARRIERS INC, BIRMINGHAM, AL	CMLP	36435	36474	550-	100.1	100.9
163	ENTERPRISE TRPTN CO, HOUSTON, TX	CMLP	36282	32898	1739	90.7	92.3
164	E L FARMER & CO, ODESSA, TX	CMSC	35544	32992	1310	92.8	96.5
165	CENTRAL TRANSPORT INC, HIGH POINT, NC	CMSC	35082	32266	2955	92.0	91.0
166	ALTRUK FREIGHT SYS INC, TAMPA, FL	CMGF	34804	34952	576	97.6	99.3
167	RIDGE TRUCK LINES INC, MCKENZIE, TN	CMHM	34780	29582	3708	85.0	83.2
168	GETTER TRUCKING INC, BILLINGS, MT	CMSC	34360	35203	156	101.5	104.3
169	MONKEM COMPANY INC, JOPLIN, MO	CMSC	33944	33644	306	98.1	97.4
170	ASSOCIATED PETROLEUMS INC, SPARTANBURG, SC	CMLT	34761	33969	636	98.3	97.7
171	R W SERVICE SYSTEM INC, TAYLOR, MI	CMGF	34255	33851	199	98.8	101.2
172	SPARTAN EXPRESS INC, GREER, SC	CMGF	33972	29531	1863	86.9	83.5
173	TRANS-NATIONAL TRUCK INC, DALLAS, TX	CMSC	33858	34115	147	100.8	98.1
174	INTERSTATE DISTRIBUTOR CO, TACOMA, WA	CTSC	33781	33274	193	98.5	96.9
175	SAM TANKSLEY TRKG INC, CAPE GIRARDEAU, MO	CMGF	33744	33224	282	98.5	89.4
176	WILEX SANDERS TRUCK LNS INC, TROY, AL	CMSC	33869	34716	1386	101.6	90.8
177	WORX INC, WEST PALM BEACH, FL	CMSC	33517	33430	1074	99.5	99.7
178	DISALVO TRUCKING CO, SAN FRANCISCO, CA	CMGF	33508	33958	340	101.4	101.2
179	ELITE CARRIER CORP, PONTIAC, MI	CMHM	33170	31515	876	95.1	98.2
180	KENAN TRANSPORT CO, CHAPEL HILL, NC	CMLT	33098	29019	2383	87.7	87.3
181	STEVE D THOMPSON TRKG, WINNSBORO, LA	CMGF	32808	30137	1622	91.9	92.7
182	SCHANNO TRPTN INC, W ST PAUL, MN	CMRC	32755	30393	1202	92.8	93.6
183	ADVANCE-UNITED EXPWAYS, MINNEAPOLIS, MN	CMGF	32563	31308	615	96.1	94.2
184	MALONE FREIGHT LINES INC, BIRMINGHAM, AL	CMGF	32515	32365	284	99.5	101.6
185	MANFREDI MOTOR TRANSIT CO, NEWBURY, OH	CTSC	32410	30454	282	94.0	91.9
186	WARD TRUCKING CORP, ALTOONA, PA	CMGF	31714	31927	553	99.1	98.7
187	PIRKLE REFRIGERT LNS INC, MADISON, WI	CMRC	31675	30809	978	96.0	92.9
188	MITCHELL TRANSPORT INC, PEPPER PIKE, OH	CMSC	31618	29793	463	94.2	92.2
189	PENN YAN EXPRESS INC, PENN YAN, NY	CMGF	31579	32963	807	104.4	102.4
190	MUNSON TRUCKING CO, MONMOUTH, IL	CMGF	31508	28185	1974	89.3	90.6
191	MERCURY MOTOR EXP INC, TAMPA, FL	CMGF	31418	36908	3132	117.5	106.0
192	FORE WAY EXPRESS INC, WAUSAU, WI	CMGF	31315	32333	404	103.3	98.5
193	MONTGOMERY TANK LNS INC, SUMMIT, IL	CMSC	31005	30135	88	97.2	96.8
194	MUSHROOM TRPTN CO INC, PHILADELPHIA, PA	CMGF	30999	31892	2362-	102.9	103.0
195	SAMMONS TRUCKING, MISSOULA, MT	CMBM	30779	28968	920	94.1	95.5
196	B J MC ADAMS INC, NORTH LITTLE ROCK, AR	CMGF	30567	28616	400	93.6	95.8
197	SHAFFER TRUCKING INC, NEW KINGSTOWN, PA	CMSC	30539	27573	2229	90.3	91.5
198	MIDDLEWEST FRTWAYS INC, ST LOUIS, MO	CMGF	30535	29067	619	95.2	93.5
199	EAZOR EXPRESS INC, PITTSBURGH, PA	CMGF	30476	30112	321	98.8	101.6
200	C R ENGLAND & SONS INC, SALT LAKE CITY, UT	CMRC	30460	31480	9	103.3	0.0
		TOTALS 1984	$4,016,147	$3,874,112	$66,697		
		TOTALS 1983	3,748,624	3,594,813	88,871		
		TOTALS 1982	3,608,786	3,539,307	20,370		

One major general commodities carrier the industry is watching with more than just routine interest is Carolina Freight, Cherryville, N.C. The company earned $13.1 million on revenues of $373.2 million last year. The unusual degree of interest being directed at Carolina Freight is due to the company's major push towards intermodal operations, using the railroads to give the regional carrier penetration into markets that Carolina would not normally have access to.

Under the direction of Kenneth G. Younger, Carolina acquired G.I. Trucking of Los Angeles and Red Arrow Freight of San Antonio as links in Younger's intermodal scheme. Basically a Texas carrier, Red Arrow lost $551,000 in 1983. But Younger's reputation as the leader of a company with strong managerial skills, appears to have worked to plug that financial leak. In 1984, Red Arrow earned $515 million, nearly as much as it had lost the year previously. That is a $1.06 million swing.

But while Younger had turned Red Arrow profitable, G.I. Trucking came up a loser by $1.1 million for 1984. Some of that loss is attributable to a breakdown of G.I.'s computerized system of billing which reportedly resulted in some major mistakes and a loss of confidence in the carrier by some west coast shippers. Younger reportedly has that problem now under control, however.

He says his plan is to: "Offer customers a total distribution package in the densely populated areas of the country."

The expansion of CCJ's Top 100 categories provides this year, for the first time, an opportunity to see what carriers are doing in the way of expansion or equipment reductions.

Passage of the Surface Transportation Assistance Act was suppose to give the motor carrier industry increased gains in productivity by allowing the industry the use of 27½-ft pups in doubles operations nationwide.

But that has not worked out in many cases because states have limited a carrier's access to facilities from the Interstate system where most doubles have been confined. Alabama is a typical case where doubles provide little or no additional productivity for for-hire carriers domiciled there, or for private carriers as well.

Nevertheless, in the Top 50, 20 carriers increased both their tractor and trailer fleets last year. That would indicate a move towards expanded service, including the use of doubles.

Significantly, 10 carriers reported reducing both the number of tractors and trailers they operate, and of this 10, six are companies who sustained losses in 1984. On the surface, that would seem to suggest some correlation between fleet size and profitability, and, in some instances, that may be true.

But readers are cautioned about jumping to conclusions because each carrier must be examined individually since the theory is not universally true.

Carriers, for example, may reduce the number of tractors and trailers they own but increase fleet size through the use of owner operators or even though leased equipment if they find themselves with a cash flow situation and the need to modernize.

The volatility of the industry has made bankers much more cautious when it comes to making big loans to truckers—too many bankers have been burned by bad paper—plus the lack of operating rights since deregulation for financial leverage against which fleets could borrow large sums has also caused some major readjustments in the industry's relationship with the country's banking industry.

The bottom line is that carrier management is more innovative when it comes to adjusting fleet size to meet cyclical flows in traffic.

Finally, there are several observations that readers ought to consider when judging the industry's performance last year.

One is a little-known fact—little-known outside of the for-hire industry—and that is the significant increase in rates for LTL freight that has occurred at a time when the nation was being told that deregulation would reduce freight rates through increased competition and new entries.

Based on standard rates supplied by the Southern Motor Cargo Rate Bureau, the minimum charge for a 100-lb shipment between January 1980 and July 1985 increased 123.6%. And rates escalated for similar freight, ranging from 91.2% for 300 lb of cargo to 57.4% for 10,000-lb shipments. These increases tend to artificially inflate a carrier's gross revenue. While revenues appear to be going up, expenses associated with handling the freight are also higher and the margin between what companies are making and what they are spending gets less each year.

ATA says: "The overhead cost trend appears firmly entrenched into the industry cost structure and its development. It is extremely unlikely that it will fall back to pre-reform levels. The rise [in overhead costs] is significant. Overhead costs have increased as proportions of revenue by 2.2 to 3.3 points. For all regulated carriers, these costs have increased to $1.04 billion from $780 million in 1983 alone."

So there is ample evidence indicating that contrary to previous predictions, shippers and ultimately the buying public—consumers—have not benefited from reduced rates and increased competition.

Of course, how much rates might have increased under regulation is an unknown. But so far, deregulation has not improved the public's lot to any large degree when it comes to cheaper LTL transportation costs.

Earl Dove, first vice chairman

Text continues on page 104

of ATA and the chairman of AAA-Cooper Freight in Dothan, Ala., says: "Too much freight is underpriced, too much is over-priced and not enough is priced right. Motor carriers don't know their costs and shippers are being told they are getting rebates when they're not."

Another observation is that deregulation has accelerated development of the truckload carrier. The advantages for profitability on a carrier-by-carrier comparison between a truckload and LTL carrier should be clear. As a consequence, carriers like J.B. Hunt, with modern, aerodynamic equipment and non-union drivers, and Builders Transport will likely continue to explode financially and in service so long as they maintain a handle on expenses.

And there is no question that a non-union for-hire carrier such as AAA-Cooper has definite advantages when it comes to figuring costs over a union carrier owned by a big conglomerate like TNT Transport.

Still another concern is the continuing inroads made by piggyback traffic and the introduction of the so-called double-stack train. While the love-hate relationship between the trucking and railroad industries drags on, there does seem to be some slight movement on the part of both industries towards some kind of partnership. Motor carriers like Preston of Maryland and Carolina Freight, who half a decade ago wouldn't have given piggyback a second look, are now actively seeking ways to develop new markets with the railroads as active partners.

And the introduction last May of the double-stack train is a major move towards efficiency. Already between 30 and 40 trains are in various stages of planning and development. Motor carriers will be watching this development closely.

Then there is the impact of higher state and federal taxes, increased user fees, coupled with insurance costs that have increased as much as 300% in some instances. All are factors that will determine profitability for motor carriers in the next five to 10 years.

The bottom line is that unless carriers get a better handle on their costs and become more efficient and more innovative, the prospects of achieving stability in the trucking industry are marginal at best.

What the 1984 Top 200 figures tell us is that for-hire trucking is still in a state of considerable change and alteration.

While the big carriers are still getting bigger, they are not without their own problems.

Clearly this is not a time for motor carriers of any size, shape or form to be complacent.

The Top 200

The performance in 1984 of CCJ's second 100 motor carriers mirrors the performance of the first 100. That should not come as any surprise. For example, the second 100 category shows 21 companies losing money against 23 in the Top 100. In addition, some carriers who made their way into the Top 100 in 1983, have slipped back, indicating their growth may have been premature. They include Schwerman Trucking of Milwaukee, ranked this year at 102 verses 83 in 1984; Coastal Tank Lines of Akron, Ohio, ranked 103; and Holmes Transportation of Framingham, Mass., listed at 105.

At the same time, a number of carriers in this grouping have made substantial progress in size, revenue and profit. One that can be considered a pacesetter in 1984 was Werner Enterprises of Omaha, Neb. In 1983, Werner ranked 146, earning $4 million on gross revenues of $37.3 million. This year, Werner is ranked 106, earning $4.4 million on revenues of $53.4 million. But like the companion carriers in the Top 100, Werner's expenses also took a substantial jump, escalating to $45.4 million from $32.2 million. So Werner's progress towards high profits also reflects a problem with expenses just as the carriers in the Top 100 have experienced.

Most financial analyses of the motor carrier industry are intrigued by the level of performance of carriers in this classification, simply because it is from here that many of the future Top 100 companies stem. And analysts like nothing better than to have a long track record on corporate performance. J.B. Hunt was in this category two years ago, as was Melton Truck Lines of Shreveport, La. Pre-Fab Transit Co,. of Farmer City, Ill., is also typical, falling into the same category as Builders Transport. In 1982, Pre-Fab ranked 136. Today, it is 97. In 1983 it was 105. So there is that mountain of evidence to indicate that Pre-Fab like Builders and Hunt, is coming on strong. From 1982 when it earned only $550,000 on revenues of $39.6 million, the company last year earned $1.5 million on revenues of $58.1 million. But even for the analyst there is a need to be cautious because while Pre-Fab continues to grow, the company's profitability in 1984 was less than it was in 1983. It declined by $304,000. That indicates just how volatile this industry can be.

Generally, for-hire motor carriers in the second 100 category are more tightly controlled, and many are owned and operated by the founder and or his family, but are at the same time more exposed to the competitive pressures of deregulation and the country's business environment. When times are good they prosper. When times are bad they go bankrupt.

Sanborn's Express of Portland, Me.; Carretta Trucking of Paramus, N.J.; and Ruan Transport of Des Moines, Iowa, are typical. While they may be less leveraged than their bigger competitors, they appear to be satisfied with the niche they have carved out for themselves, and by maintaining personalized relationships with shippers, they operate week-to-

week, year-in and year-out with remarkable consistency. And their credit line at the local bank is usually pretty good.

27 fleets disappear from list

This year it should be noted that because of the change in the reporting source, we are listing 27 carriers who do not appear. It is impossible to determine what happened to the 27 fleets. Some may have reduced their level of operations and are now to small to qualify, or they may have received an exemption from filing.

From the best of our sources, however, here is the status of some of the carriers who were previously included in the Top 200 list. International Transport of Rochester, Minn., ranked 60th in 1983; Carl Subler Trucking, Versailles, Ohio, ranked 127th; Clairmont Transfer Co., Escanaba, Mich., ranked 129; and Poole Truck, Evergreen, Ala., ranked 77, were all exempt from filing.

Standard Trucking of Charlotte, N.C., says it will not file, while United Trucking Service of Dearborn, Mich., is now too small to qualify. In 1983 it ranked 174.

Mercury Motor Express of Tampa, Fla., is no longer operating. It was ranked 111 in 1983.

And RTC Transportation of Forest Park, Ga., ranked 36 last year, has been sold to the Embarcadero Investment Group of Phoenix for about $7 million. Proceeds of the sale went to pay off the carrier's $12 to $13 million debt. The carrier's name will be changed to Georgia-Florida Transportation. RTC also sold its Canadian operation to W.W. Trucking Co. of Dover, Fla.

After five years of deregulation, it appears the for-hire segment of the trucking industry is worse off than before. According to figures from the Interstate Commerce Commission, the after-tax profit margin for all carriers in 1984 was 2.35%. That compares unfavorably with the 3.1% reported in 1978. Clearly the face of the common carrier industry is changing.

Index To The Top 100 As Ranked By Revenue

	1984	1983
AAA Cooper Transportation	83	86
ABF Freight System	10	9
A-P-A Transport	50	58
Advance Transportation	81	87
Aero Mayflower	19	19
Allied Van Lines	12	13
American Freight System	17	15
Anchor Motor Freight	16	18
Associated Truck Lines	27	24
Atlas Van Lines	34	41
Auto Convoy Co.	67	-
Bekins Van Lines	26	30
Bowman Transportation	35	38
Brown Transport	32	36
Builders Transport	66	-
Burnham Van Service	71	99
CRST Inc.	60	71
C W Transport	40	50
Campbell "66"	59	57
Carolina Freight	11	11
Cassens Transport	77	-
Central Freight	29	28
Central Transport	20	21
Chemical Leaman	36	39
Churchill Truck Lines	61	66
Commercial Carriers	33	40
Commercial Lovelace	100	94
Complete Auto Transit	21	20
Consolidated Freightways	5	4
Crete Carrier Corp.	73	81
Dallas & Mavis Fwdg	88	-
Duff Truck Line	98	-
E & L Transport Co.	70	82
Estes Express Lines	95	-
FFE Transptn. Services	87	88
Garrett Freightlines	31	33
Graves Truck Lines	76	69
Global Van Lines	65	64
Groendyke	86	95
Hall's Motor Transit	30	25
Holland Motor Express	56	65
Hunt, J.B. Transport Inc.	49	80
Interstate Contract Carriers	75	78
Jack Cooper Trpt	39	-
Janesville Auto Trpt.	93	-
Jones Motor Co.	69	-
Jones Transfer Co.	83	92
Jones Truck Lines	37	34
Kenosha Auto Trpt	89	-
M & G Convoy	57	68
Matador Service	85	-
Matlack Inc.	24	29
McLean Trucking	8	8
Melton Truck Lines	94	-
Merchants	54	56
Midwest Coast Transport	90	91
Midwestern Distribution	39	48
Miller Transporters	99	-
Milne Truck	48	59
Mistletoe Exp. Service	72	75
Motor Convoy	55	70
Murphy Motor Freight	52	55
NTC of America Inc.	63	96
National Freight	58	63
New Penn Mtr Express	87	-
No. American Van Lines	7	7
Northwest Transport	64	74
Nu-Car Carriers	43	53
Old Dominion	41	42
Oneida Motor Freight	92	98
Overland Express	62	79
Overnite Transportation	9	10
Pacific Motor	46	44
Pauls Trucking Corp.	96	93
Penna. Truck Lines	80	84
Pilot Freight	25	27
Pre-Fab Transit	97	-
Preston Trucking	18	17
Red Star Express	51	52
Riss Internatl. Corp.	78	67
Roadway Express	3	3
Ryder/P-I-E Nationwide Inc.	6	6
St. Johnsbury	22	22
Schneider Transport	28	32
Signal Delivery	23	23
Smith's Transfer	14	12
Southeast Freight Lines	79	89
Southwest Motor Freight	91	-
System 99	74	73
Thurston Motor	44	49
Transcon Lines	15	14
Transus Inc.	53	54
Tri-State	45	47
United Parcel (Ill.)	1	1
United Parcel (NY)	2	2
United Van Lines	13	16
Viking Freight System	47	62
Watkins Motor	42	43
Western Express	68	-
Yellow Freight	4	5

INDUSTRY TRENDS & STATISTICS

By **JERRY STANDLEY**, *Editor-In-Chief*, and **MARGARET ROMAN-SLAVIN**, *Marketing Manager*

Truck and trailer sales in 1984 brought much needed relief to industry suppppliers, with factory sales of Class 8 trucks leading the pack, gaining 76.3% over 1983. Total trailer sales were 52.8% higher (112,393 units) than in 1983 (see the charts on the following pages).

Forecasters of heavy truck sales for 1985 are cautiously projecting that sales of medium- and heavy-duty trucks will be close to 1984 levels. But trailer sales are forecasted to decrease in each of the next several years.

Information presented in Industry Trends and Statistics was compiled by CCJ's editorial and marketing staffs using data supplied by: the American Trucking Associations, Inc.; CCJ's Census of the Motor Fleet Market (April 1985); the Motor Vehicle Manufacturers Association; and the Department of Commerce, Bureau of Census, Industry Division.

STATISTICAL ANALYSIS OF THE TRUCK INDUSTRY—PRIVATE AND FOR-HIRE CARRIAGE

FLEET SIZE	TOTAL FLEETS	TOTAL VEHICLES *	# OF STRAIGHT TRUCKS OPERATED	# OF TRACTORS OPERATED	# OF TRAILERS OPERATED	# OF BUSES OPERATED	# OF OFF-HIGHWAY VEHICLES OPERATED
500 & over	4,125	5,789,064	2,050,475	821,640	2,359,457	231,285	326,207
100—499	14,142	2,073,167	695,856	361,775	699,368	130,581	185,587
50—99	14,151	729,498	247,361	127,837	223,955	51,666	78,679
25—49	20,217	526,493	205,903	83,241	138,928	40,557	57,864
10—24	20,692	256,574	118,069	39,200	58,458	17,562	23,258
TOTAL	**73,327**	**9,374,769**	**3,317,664**	**1,433,693**	**3,480,166**	**471,651**	**671,595**
VOCATION OR BUSINESS							
Common/ Contract	15,045	2,598,251	291,318	581,497	1,672,831	15,395	37,210
Lease/Rental	3,667	1,514,717	555,083	268,400	652,665	9,987	28,582
Food Industry	9,120	671,514	260,292	134,922	235,675	3,592	37,033
Local, State & Federal Government	6,802	1,219,934	769,437	85,532	91,620	29,705	243,640
Construction/ Mining	11,195	562,120	240,365	51,830	104,388	3,651	161,886
Manufacturing/ Processing	6,267	408,248	110,408	81,511	163,579	3,116	49,634
Petroleum	3,101	168,507	77,456	32,189	49,828	1,305	7,729
Public Utility	3,254	662,059	522,061	10,659	76,091	3,652	49,596
Retail/ Wholesale Delivery	6,752	380,186	174,263	52,762	122,848	5,365	24,948
Sanitation & Refuse	777	49,130	39,326	2,736	4,196	82	2,820
Schools	3,500	222,254	46,412	2,344	4,542	158,462	10,494
Buses	1,672	195,270	9,480	1,040	2,584	179,284	2,882
Other	2,175	722,579	221,763	128,271	293,349	58,055	15,141
TOTAL	**73,327**	**9,374,769**	**3,317,664**	**1,433,693**	**3,480,166**	**471,651**	**671,595**

*—Does not include passenger cars. *Source: CCJ Census of the Motor Fleet Market, April, 1985*

TRENDS & STATISTICS

NUMBER OF FOR-HIRE CARRIERS

Year	Class I (Over $5 Million)	Class II ($1-$5 Million)	Class III (Under $1 Million*)	TOTAL
1984	1,088	1,554	27,370	30,481
1983	1,139	1,631	24,411	27,517
1982	1,144	2,139	22,059	25,722
1981	1,031	2,293	18,563	22,270*
1980	947	2,164	14,610	18,045*
1979	992	2,754	13,337	17,083
1978	1,045	2,929	12,900	16,874

Class 2 carriers (gross annual revenues: $1m - $5m) continue to disappear from the highways, with 77 fewer carriers surviving in 1984 than 1983. The number of Class 2 carriers has decreased 50% since 1977 when there were 3101. Many have been acquired or merged with larger Class 1 carriers, whose numbers have remained relatively constant. A few others have undergone Chapter 11 reorganization, emerging as Class 3 carriers (less than $1m gross annual revenues). The number of Class 3 carriers continues to increase with 336 new authorities granted in 1984 for a total of 27,517 carriers, a 40% increase since 1977 when there were 16,606.
Source: American Trucking Associations, Inc.

SELECTED FINANCIAL DATA FROM CLASS 1 AND CLASS 2 COMMON CARRIERS

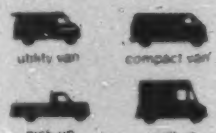
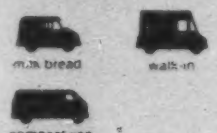
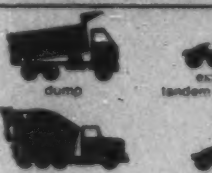
	All General Freight & Specialized Carriers 1984 ($000)	1983 ($000)	Percent of Change (84-83)	Percent of Revenue (1984)
Number of Carriers	594	594		
GROSS OPERATING REVENUES	$21,730,087	$19,456,931	11.68%	100.00%
Salaries-Officers and Supervisors	$1,557,996	$1,462,344	6.54%	7.17%
Salaries & Wages	$5,956,126	$5,371,182	10.89%	27.41%
Miscellaneous Paid Time Off	$566,211	$551,139	2.73%	2.61%
Other Fringes	$2,180,005	$1,869,783	16.59%	10.03%
Salaries, Wages & Fringe Benefits	$10,260,338	$9,254,448	10.87%	47.22%
Operating Supplies & Expenses	$2,681,875	$2,361,576	13.56%)	12.34%
General Supplies & Expenses	$869,235	$758,660	14.58%	4.00%
Operating Taxes & Licenses	$677,219	$536,577	26.21%	3.12%
Insurance	$486,358	$405,083	20.06%	2.24%
Communication & Utilities	$365,485	$333,482	9.60%	1.68%
Depreciation & Amortization	$802,505	$739,090	8.58%	3.69%
Equipment Rental & Purch. Trptn.	$4,368,413	$3,872,232	12.81%	20.10%
Building & Office Equipment Rental	$207,421	$193,068	7.43%	0.95%
Other & Miscellaneous Expenses	$142,826	$99,427	43.65%	0.66%
TOTAL OPERATING EXPENSES	$20,861,675	$18,553,643	12.44%	96.00%
NET CARRIER OPERATING INCOME	$868,412	$903,288	(3.86)%	4.00%
NET INCOME BEFORE TAXES	$788,210	$830,944	(5.14)%	3.63%
NET INCOME AFTER TAXES	$504,498	$533,024	(5.35)%	2.32%
OPERATING RATIO	96.00	95.36		
NET PROFIT MARGIN	2.32	2.74		
Vehicle Miles Traveled	10,271,380	9,429,808	8.92%	
Tons Handled	369,455	342,244	7.95%	

This chart compares 1984 with 1983 totals and percentage changes in operating costs for 594 Class 1 and 2 common carriers. While these carriers operated 9% more miles and carried 8% more tons than in the previous year, and have a slightly a improved group operating ratio (96 from 95.36), substantial overhead expense increases caused the group's 1984 net profit margins to dip slightly to 2.32% from 2.74% in 1983. The greatest percentage increase in expenses, 44%, was for miscelleneous. Operating Taxes and Licenses expenditures show the second highest increase—26%. This is in addition to a 20% increase in 1983. Insurance premiums expenses are up 20% over 1983 (for more details on what's happening to insurance costs, see feature story and new information in TOP 100 carrier charts, both in this issue).

Items listed in Selected Financial Data were compiled by ATA, based on carrier financial reports to the ICC by Class 1 and 2 "Instruction 27" carriers (75% or greater revenues derived from general commodity freight). Contract carriers and household goods movers are excluded. To provide a more accurate comparison, figures for 1983 are restated on the basis of those carriers filing 1984 returns with the ICC.

FACTORY SALES OF TRUCKS BY GVW (1970 through 1984)

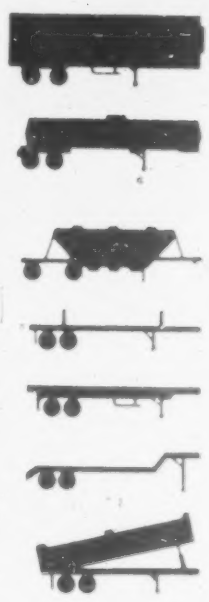
(Including exports; excluding tactical military vehicles)

		No. of Units	% of Total
	CLASS 1 **6,000 lb & Less**	**16,808,212**	**47.9**
	**CLASS 2** **6,001-10,000 lb**	**13,657,166**	**38.9**
	**CLASS 3** **10,001-14,000 lb**	**273,429**	**.8**
	CLASS 4 **14,001-16,000 lb**	**48,617**	**.1**
	CLASS 5 **16,001-19,500 lb**	**193,413**	**.6**
	CLASS 6 **19,501-26,000 lb**	**1,723,314**	**4.9**
	CLASS 7 **26,001-33,000 lb**	**608,054**	**1.7**
	**CLASS 8** **33,001 lb & Over**	**1,743,258**	**5.0**
	TOTAL	**35,055,463** *	**100.0**

* Estimated total registrations Class 1-8 = 40,142,872.

Source: MVMA and CCJ Marketing Dept.

BREAKDOWN OF NEW TRAILER SHIPMENTS (1970 through 1984)



	Number	% of Total
VANS		
Dry Freight/Closed Top	1,012,195	46.4
Dry Freight/Open Top	65,781	3.0
Insulated/Semi-Insulated	251,955	11.5
Drop Frame	64,622	3.0
Livestock	22,572	1.0
Total Vans	1,417,125	64.9
SPECIAL TYPES		
Tanks/Liquid	96,236	4.4
Dry Bulk	26,638	1.2
Pole and Logging	24,854	1.1
Platform	342,070	15.7
Low-Bed	78,294	3.6
Dump	97,829	4.5
All Others	100,619	4.6
Total Special Types	766,540	35.1
TOTAL COMPLETE TRAILERS	**2,183,665**	**100.0**
Detachable Trailers[1]	140,469	
Detachable Chassis[2]	201,989	
Dollies and Converter Gear[3]	47,671	

1. Mostly container units. 2. Mostly for use with containers. 3. Separate axle and fifth wheel assembly for converting semi-trailer into full trailer in twin trailer doubles operations.
Source: Industry Div., Bureau of the Census, Dept. of Commerce. Compiled by CCJ Marketing Dept.

NEW TRAILER SHIPMENTS BY TYPE

Type of Trailer	1984	1983	1982	1981	1980
VANS					
Dry Freight/Closed Top	115,399	58,954	41,461	49,153	57,930
Dry Freight/Open Top	4,087	3,215	2,757	3,444	5,445
Insulated/Semi Insulated	27,768	19,961	17,066	15,828	16,574
Drop Frame	7,112	3,193	2,837	2,806	5,286
Livestock	2,234	1,121	771	690	1,013
Total Vans	156,600	86,444	64,892	71,921	86,248
SPECIAL TYPES					
Tanks/Liquid	4,818	3,859	5,292	7,281	8,407
Dry Bulk	1,556	1,002	1,297	1,962	1,718
Pole and Logging	3,371	3,433	1,025	1,134	1,175
Platform	25,685	15,476	13,202	22,054	18,924
Low-Bed	8,281	3,967	3,379	9,137	7,803
Dump	8,895	4,466	4,707	6,548	6,586
All Others	22,898	3,064	2,396	2,418	5,841
Total Special Types	77,504	35,267	31,298	50,534	50,454
TOTAL COMPLETE TRAILERS	**234,104**	**121,711**	**96,190**	**122,455**	**136,702**
Detachable Trailers[1]	983	2,215	3,988	7,239	11,849
Detachable Chassis[2]	25,777	4,531	2,918	8,615	14,202
Dollies/Converter Gear[3]	6,759	3,072	1,375	2,816	1,849

1. Mostly container units. 2. Mostly for use with containers. 3. Separate axle and fifth wheel assembly for converting semi-trailer into full trailer in twin trailer doubles operations.
Source: Industry Div., Bureau of the Census, Dept. of Commerce. Compiled by CCJ Marketing Dept.

A near record 234,104 total trailer shipments in 1984 almost doubled 1983 shipments of 121,711 units. After several tight years in a row, carriers finally were able to upgrade their fleets with new equipment. Most of them bought closed top dry vans, which comprised 49% of all shipments. Insulated and semi-insulated trailers were the next biggest group comprising 12% of all units shipped. 11% were platform trailers. W. Boone Groves, Jr., market manager, commercial automotive division, ALCOA, presented his forecasts for several years of decreasing trailer sales in 1985, 1986 and 1987 at this year's Truck Trailer Manufacturer's Convention: 1985, 170,000 units; 1986, 140,000 units; 1987, 125,000 units. "Higher interest rates in these three years, and the expansive level of orders in 1984 account for these declining forecast figures," Boone says. He also says that the volatility of the trailer market, which can experience 25% swings from year to year, has prompted ALCOA to shorten its forecast period from the traditional five years to three years.

DIESEL ENGINES USED IN TRUCKS

(Factory sales from U.S. plants including exports)

Make of Truck		Cat	Cummins	Detroit Diesel	IHC	Mack	All Other	Total
Chevrolet	1984	2,071	—	63,410	—	—	1,295	66,776
	1983	1,001	—	49,461	—	—		50,462
Ford	1984	19,240	10,619	9,746	64,055	—	1,826	105,486
	1983	10,381	5,158	7,482	43,472	—	5,048	71,521
Freightliner	1984	3,623	13,792	399	—	—	—	17,814
	1983	1,852	8,445	702	—	—	—	10,999
GMC	1984	5,002	9,316	26,344	—	—	769	41,431
	1983	2,579	4,262	29,720	—	—		36,561
IHC	1984	5	26,440	1,304	30,227	—	—	57,976
	1983	28	16,169	1,326	19,364	—		36,889
Jeep Corp.	1984	—	—	—	—	—	1,841	1,841
	1983	—	—	—	—	—	574	574
Kenworth	1984	4,222	8,943	505	—	—	—	13,670
	1983	2,202	6,106	240	—	—	—	8,548
Mack	1984	256	735	89	—	24,682	139	25,901
	1983	432	490	65	—	12,231	127	13,345
Mercedes Benz	1984	—	—	—	—	—	4,453	4,453
	1983	—	—	—	—	—	3,139	3,139
Peterbilt	1984	6,091	8,323	228	—	—	—	14,642
	1983	3,141	5,181	181	—	—	—	8,503
White	1984	1,878	5,633	1,648	—	—	740	9,899
	1983	735	3,329	645	—	—	412	5,121
Others	1984	105	397	146	—	—	229	877
	1983	82	166	153	—	—	—	401
Total	1984	42,493	84,198	103,819	94,282	24,682	11,292	360,766
	1983	22,413	49,306	89,977	62,236	12,231	9,300**	247,261

**—1983 total does not match 1983 total published last year because Volkswagen is deleted from this year's totals. "All other" includes: Isuzu, Mercedes, Saab-Scania, Volvo and Toyo Kogyo (Mazda), Renault, Hino, Mitsubishi, Deutz, Nissan. Perkins data not available.

Source: Motor Vehicle Manufacturers Assn. Reporting firms do not represent entire industry.

DOMESTIC TRUCK FACTORY SALES BY GVW

	1984	1983	1982	1981	1980	1979
Class 1 (6000 lb and less)						
Total Sales	1,610,835	1,296,644	869,897	583,341	547,426	961,345
Diesel Sales	15,234	25,565	44,586	47,789	68,868	31,894
% Diesel	0.9%	2.0%	5.1%	8.2%	12.6%	3.3%
Class 2 (6001-10,000 lb)						
Total Sales	997,626	787,611	744,350	716,556	679,532	1,413,229
Diesel Sales	122,995	89,161	72,868	20,393	4,397	653
% Diesel	12.3%	11.3%	9.8%	2.8%	.6%	.05%
Class 3-4 (10,001-16,000 lb)						
Total Sales	5	3	10	263	4,827	19,727
Diesel Sales	-	-	-	-	-	-
% Diesel	-	-	-	-	-	-
Class 5 (16,001-19,500 lb)						
Total Sales	5,502	1,143	1,333	1,843	1,761	3,140
Diesel Sales	-	-	-	-	-	-
% Diesel	-	-	-	-	-	-
Class 6 (19,501-26,000 lb)						
Total Sales	29,273	24,310	22,533	50,762	50,124	109,521
Diesel Sales	13,789	9,703	8,559	19,336	12,337	14,404
% Diesel	47.1%	89.9%	38.0%	38.1%	24.6%	13.2%
Class 7 (26,001-33,000 lb)						
Total Sales	74,445	48,896	48,568	41,503	48,728	40,235
Diesel Sales	43,412	29,468	26,282	27,651	30,950	23,121
% Diesel	58.3%	60.3%	54.1%	66.6%	63.5%	57.5%
Class 8 (33,001 lb & Over)						
Total Sales	136,584	78,575	68,040	94,958	89,711	164,095
Diesel Sales	137,692	78,008	67,453	93,769	86,002	157,762
% Diesel	99.4%	99.3%	99.1%	9.7%	96.3%	96.1%

TRUCK FACTORY SALES AND TRUCKS WITH DIESELS

(U.S. domestic only; excluding tactical military vehicles)

GVW Group lbs	Truck Sales With Diesel Engines	Chevrolet	GMC	Chrysler	Ford	Freightliner	International	Jeep Corp.	Kenworth	Mack	Mercedes-Benz	Peterbilt	Volvo White	Others	Total Trucks
Under 6,000 lb	Sales—1984	581,311	143,697	128,364	614,804	—	—	142,659	—	—	—	—	—	—	1,610,835
	w/Diesel—1984	9,824	3,791	—	1,619	—	—	—	—	—	—	—	—	—	15,234
	Sales—1983	533,292	125,507	95,016	474,454	—	—	66,103	—	—	—	—	—	—	1,296,644
	w/Diesel—1983	13,657	6,117	—	4,995	—	—	—	—	—	—	—	—	—	25,565
6,001 to 10,000 lb	Sales—1984	377,160	92,692	65,116	440,211	—	—	22,444	—	—	—	—	—	3	997,626
	w/Diesel—1984	50,549	11,123	—	61,323	—	—	—	—	—	—	—	—	—	122,995
	Sales—1983	285,722	76,844	35,078	364,924	—	—	25,039	—	—	—	—	—	4	787,611
	w/Diesel—1983	32,590	14,862	—	41,709	—	—	—	—	—	—	—	—	3	99,161
10,001 to 14,000 lb	Sales—1984	—	—	—	—	—	—	—	—	—	—	—	—	1	1
	w/Diesel—1984	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	Sales—1983	—	—	—	—	—	—	—	—	—	—	—	—	1	1
	w/Diesel—1983	—	—	—	—	—	—	—	—	—	—	—	—	—	—
14,001 to 16,000 lb	Sales—1984	—	—	—	—	—	—	—	—	—	—	—	—	4	4
	w/Diesel—1984	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	Sales—1983	—	—	—	—	—	—	—	—	—	—	—	—	2	2
	w/Diesel—1983	—	—	—	—	—	—	—	—	—	—	—	—	—	—
16,001 to 19,500 lb	Sales—1984	303	5,188	—	6	—	—	—	—	—	—	—	—	5	5,502
	w/Diesel—1984	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	Sales—1983	246	881	—	—	—	—	—	—	—	—	—	—	16	1,143
	w/Diesel—1983	—	—	—	—	—	—	—	—	—	—	—	—	—	—
19,501 to 26,000 lb	Sales—1984	3,798	3,282	—	9,820	—	9,771	—	—	—	2,454	—	—	148	29,273
	w/Diesel—1984	367	853	—	1,965	—	8,002	—	—	—	2,454	—	—	148	13,789
	Sales—1983	2,869	3,246	—	7,004	—	9,221	—	—	—	1,970	—	—	—	24,310
	w/Diesel—1983	305	855	—	1,182	—	5 391	—	—	—	1,970	—	—	—	9,708
26,001 and over	Sales—1984	11,944	15,570	—	30,366	—	14,888	—	—	—	1,596	—	—	81	74,445
	w/Diesel—1984	3,433	6,218	—	17,264	—	14,830	—	—	—	1,596	—	—	81	43,412
	Sales—1983	7,349	10,621	—	20,190	—	9,679	—	—	—	1,057	—	—	—	48,896
	w/Diesel—1983	2,247	4,866	—	11,718	—	95806	—	—	—	1,057	—	—	—	29,468
33,001 lb and over	Sales—1984	789	14,687	—	14,705	17,773	28,199	—	13,543	24,172	—	14,268	9,824	624	138,584
	w/Diesel—1984	458	14,500	—	14,463	17,773	28,067	—	13,543	24,172	—	14,268	9,824	624	137,692
	Sales—1983	488	7,701	—	7,931	10,950	17,874	—	8,135	11,777	—	8,327	5,054	338	78,575
	w/Diesel—1983	247	7,543	—	7,803	10,950	17,834	—	8,135	11,777	—	8,327	5,054	338	78,009
Total	Sales—1984	975,305	275,116	193,480	1,109,912	17,773	52,858	165,103	13,543	24,172	4,050	14,268	9,824	866	2,856,270
Total	w/Diesel—1984	64,631	36,485	—	96,634	17,773	50,889	—	13,543	24,172	4,050	14,268	9,824	853	333,122
Total	Sales—1983	829,966	224,800	130,094	874,503	10,950	36,774	91,142	8,135	11,777	3,027	8,327	5,054	361	2,237,182
Total	w/Diesel—1983	49,046	34,242	—	66,997	10,950	32,805	—	8,135	11,777	3,027	8,327	5,054	338	231,905

Reporting firms do not represent entire industry, and data is factory sales from U.S. plants only. Volvo White Diesel 1984 numbers include Autocar. All others include Marmon, Hino, Oshkosh.
Source: MVMA

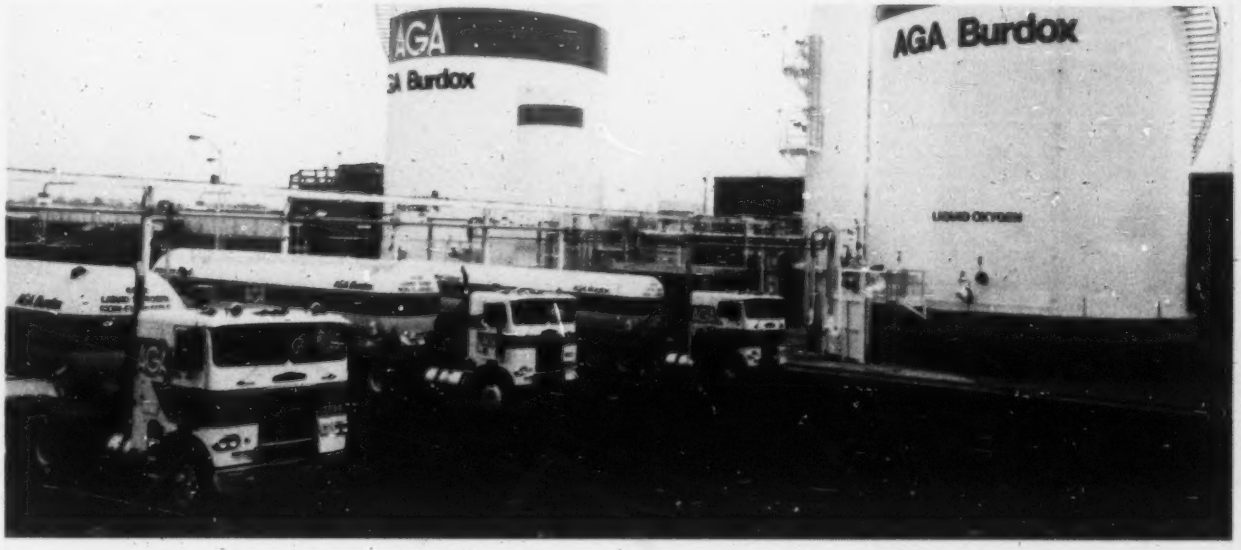
Domestic factory sales of heavy-duty vehicles rebounded strongly in 1984 compared to the previous year. Sales of Class 8 trucks showed the largest percentage increase of all compared to 1983, 76.3%. Total truck factory sales in 1984 increased 619,088 units, 27.6%, over 1983. However, Class 1 and 2 vehicles comprised 84.6% of the increase. Sales for the Class 6, 7 and 8 group were up 90,521 units or 59.6% over 1983 levels, accounting for 14.6% of the total truck sales percentage increase. Class 6 sales were up 4963 units, or 20.4 %. Class 7 sales increased by 60,009 units, a 52.2% gain over 1983.

The dieselization rate in Class 8 remained constant at 99.4%. The dieselization of Class 6, however, jumped to 47.1% from 39.9% in 1983. Class 7 dropped slightly to 58.3% in 1984, from 60.3% in 1983.

Forecasters for 1985 are cautiously projecting that 1985 sales of medium and heavy-duty trucks will be close to 1984 levels.

PRIVATE FLEETS

By **RICH CROSS**, *Senior Technical Editor*



Based on the total number of vehicles operated, private carriage dominates the trucking industry by an overwhelming margin.

This section lists a representative sample of large private fleets, grouped by vocation, and based on data acquired by CCJ within the last 60 days.

Since deregulation, private carriage has become as complex as it is big, making it difficult for fleet managers to compare their operating costs against those of other private fleets. Responding to management's need for more information, the Private Truck Council of America, Inc. (PTCA) contracted with A.T. Kearney, Inc. for an ongoing, in-depth study of private trucking.

This section summarizes highlights of A.T. Kearney's findings, based on 1984 cost and operational data provided by 519 private fleets. For purposes of the study, a "tractor-trailer fleet" is one where 80% or more of the power units are tractors. The same guideline is used to define a "straight truck/van fleet," while a "mixed fleet" is one that doesn't fit either of these categories.

Analysis of information shows:

(1) Company drivers who are union members cost an average of $1.44 per mile, compared with $1.27 per mile for company, non-union drivers. Non-union fleets comprised 60% of those surveyed, up from 54% in 1983 and 51% in 1982.

(2) Fleets that lease equipment have an average operating cost of $1.28 per mile, due to "better utilization of equipment and drivers than the company-owned fleets," which average $1.35 per mile. In '84, 70% leased their equipment, compared with 65% in '83 and 58% in '82.

(3) Twenty-seven percent have obtained for-hire authority under provisions of the "Toto" decision, compared with 19% in 1983. In addition, 49% participate in compensated inter-corporate hauling, which represents little change from 1983.

(4) Those companies not participating in inter-corporate hauling averaged 23% empty miles, while companies with for-hire authority averaged 20% empty miles. Notably, companies participating in both inter-corporate hauling and for-hire carriage averaged 19% empty miles, which is 2% below the national average.

(5) Fleets operating less than 30 tractors have an average operating cost per mile of $1.30, while larger carriers average $1.38 per mile. This is because smaller fleets had better tractor and driver utilization, according to A.T. Kearney.

(6) In 1984, operating a private tractor-trailer fleet cost an average of $1.32 per mile. General and administrative cost accounted for approximately 8¢ per mile, equipment cost 68¢ per mile, and drivers cost 57¢ per mile.

To obtain a copy of the A.T. Kearney survey, contact PTCA at 2022 P St., N.W., Washington, D.C. 20036 or call 202-785-4900. The cost is $40 for PTCA members and $75 for non-members.

To obtain a detailed and customized analysis of the database, contact Pat Malloy, A.T. Kearney, Inc., 222 South Riverside Plaza, Chicago, Ill. 60606 or call 312-648-0111.

PRIVATE FLEETS

[illegible]	[illegible]	Straight Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Annual Mileage (millions)	% Leased
Honeywell, Inc	Minneapolis, MN	2331	0	0	6351	0	8682	115	100
Westinghouse Electric Corp	Pittsburgh, PA	2663	533	568	4651	3	8418	184.8	0
Goodyear Tire & Rubber	Akron, OH	4000	100	100	2500	50	6750	NA	0
Montgomery Ward & Co	Chicago, IL	2500	250	1200	300	0	4250	80	100
N L Industries, Inc	Houston, TX	1477	209	647	1555	82	3970	85	5
Wickes Companies, Inc	Santa Monica, CA	825	387	978	657	655a	3509	97	40
Crown Zellerbach Corp	San Francisco, CA	591	433	850	1518	0	3392	50	10
Air Products & Chemicals, Inc	Allentown, PA	340	500	1360	500	170	2870	48	0
National Linen Service	Atlanta, GA	2140	14	14	325	0	2493	33	0
Ingersoll-Rand Co Ltd	Woodcliff Lake, NJ	25	50	150	2222	NA	2447	NA	100
Reliance Electric	Cleveland, OH	110	25	50	2100c	0	2185	NA	95
Union Carbide Corp, Linde Div	Springfield, NJ	83	400	1300	337f	0	2120	37	7
Potlach Corp	San Francisco, CA	443	234	157	121	931	1885	NA	7.8
Greif Brothers Corp	Delaware, OH	40	300	1236	125	0	1701	NA	0
Environmental Industries	Calabasas, CA	698	31	407	96	348	1580	NA	0
American Greetings	Cleveland, OH	5	25	60	1450	0	1540	24	NA
American Hoechst Corp	Somerville, NJ	87	12	68	1316	0	1483	39.5	39.5
Floyd S Pike Electrical Contractor	Mount Airy, NC	777	6	362	30	256	1431	NA	0
Hewlett Packard, S Sales Reg	Atlanta, GA	0	0	0	1417	0	1417	27	0
Trinity Industries	Dallas, TX	18	200	450	40	700	1408	14	8
West Point Pepperell Trans	West Point, GA	1	177	536	480	3	1197	26	100
Beckman Instruments	Fullerton, CA	150h	2	5	1019	NA	1194d	NA	100
Caterpillar Tractor Co	Peoria, IL	310	75	345	388	0	1118	NA	14
American Linen Supply Co	Minneapolis, MN	1081	18	23	0	5	1104	22.5	0
TG&Y Stores Co	Oklahoma City, OK	3	204	620	236	0	1063	36	100
Continental Can Co	Oak Brook, IL	0	175	585	300	0	1060	14	100
CW Wright Construction	Richmond, VA	675	50	225	21	75	1046	8	0
Rite Aid Corp	Harisburg, PA	74	133	270	537	3	1017	8.5	0
Hillenbrand Industries, Inc	Batesville, IN	252	209	465	76	6	1008	16.5	0
Wometco Enterprises	Miami, FL	710	0	0	297	0	1007	20.4	5
Sully-Miller Contracting Co	Long Beach, CA	569	111	226	66	30	1002	NA	9
Scotty's Inc	Winter Haven, FL	350	43	165	36	400b	994	NA	NA
Texas Industries, Inc	Dallas, TX	500	100	75	300	NA	975	NA	50
USS Agricultural Chemicals	Atlanta, GA	499	60	204	177	18	956	20	15
Grossmans Div, Evans Products	Braintree, MA	85	17	150	165	360	955d	NA	0
Liquid Air Ind, Gases Div	San Francisco, CA	10	213	700	NA	0	923	14.6g	8
Western Auto Supply	Kansas City, MO	0	254	484	168	0	906	16.2	0
Sears, Roebuck & Co, Dallas Reg	Dallas, TX	57	247	592	2	0	898	17	0
Northrop Aircraft Div	Hawthorne, CA	245d	16	52	82	413	886e	2.5	3
Brad Ragan, Inc	Spruce Pine, NC	662	18	88	100	NA	868	NA	0
Growmark, Inc	Bloomington, IL	6	150	678	0	0	834	11.3	5
Riedel International	Portland, OR	237	20	156	193c	226	832	NA	NA
Johnson Controls Battery Div	Milwaukee, WI	0	260	570	0	0	830	12.5	0
Linder Industrial Machinery Co	Lakeland, FL	62	3	3	100	550	718	5	0
Aluminum Co of America	Pittsburgh, PA	0	81	626	0	0	707	7.8	12
James Julian, Inc	Wilmington, DE	128	21	89	16	410	664	NA	0
Cianbro Corp	Pittsfield, ME	175	20	120	100	200	615	10	5
Union Camp Corp	Wayne, NJ	0	152	318	0	0	470	NA	0

*—does not include cars; a—light trucks; b—includes lift trucks; c—includes light trucks; d—includes some miscellaneous equipment; e—includes 78 miscellaneous vehicles; f—light pick-ups; g—trucks only; h—includes 126 vans; NA—not available

OPERATING STATISTICS (PTCA - A.T. KEARNEY)

Description	Straight Truck/Van 1983	Straight Truck/Van 1984	Tractor/Trailer 1983	Tractor/Trailer 1984
Miles Driven	138,104,000	20,720,000	149,122,000	175,111,000
Average Miles/Trip	232	146	546	520
Number Of Drivers	3,466	1,491	3,851	5,625
Miles Per Driver	32,000	30,000	57,900	52,200
Number Of Tractors	261	53	1,758	2,908
Number Of Straight Trucks/Vans	4,955	1,643	1,357	5,438
Percent Total Empty Tractor Miles	35	28	29	23
Trailer To Tractor Ratio	2.0	4.7	2.4	2.2
Average Miles Per Tractor	58,600	52,000	74,200	67,000
Average Miles Per Straight Truck	32,000	24,800	23,200	26,500
Average Miles Per Van	26,100	20,600	15,700	18,700

Because of small sample size and fleet definition, care should be used when referencing these statistics.

OPERATING STATISTICS (PTCA - A.T. KEARNEY)

Description	Tractor/Trailer 1983	Tractor/Trailer 1984
Miles Driven	1,263,600,000	1,496,500,000
Average Miles Per Trip	888	921
Number Of Drivers	20,559	21,971
Miles Per Driver	76,400	78,600
Number Of Tractors	14,753	16,366
Number Of Straight Trucks/Vans	242	210
Percent Total Empty Tractor Miles	21	21
Trailer To Tractor Ratio	2.4	2.6
Average Miles Per Tractor	97,100	100,600
Average Tractor Age	3	3
Average Tractor M.P.G.	5.4	5.5
Power Units/Mechanic Ratio*	5.4	5.2
Union/Non-union Fleets	164/195	177/262
Leased/Owned Equipment	217/119	282/123

* For companies that perform 90% or more of their own maintenance

PRIVATE FLEETS

LEASE/RENTAL	Headquarters	Trucks	Tractors	Trailers	Cars	Off-Highway	Total Vehicles
Peterson, Howell & Heather	Baltimore, MD	49,907	e	3329	171,711	8444	233,391
Ryder Truck Rental (a)	Miami, FL	42,441	21,636	16,276	1642	0	81,995
Automotive Rentals, Inc.	Maple Shade, NJ	19,830	450	650	44,070	e	65,000
Lend Lease	Minneapolis, MN	600	5700	1200	50,000	0	57,500
Dart & Kraft Financial Corp	Minneapolis, MN	15,000	2500	4500	32,000	0	54,000
Leaseway Transportation	Cleveland, OH	11,000	4600	5500	NA	29,000	52,000i
Enterprise Leasing Co	St. Louis, MO	2800	200	0	40,500	100	43,600
Gelco-TIP Trailer Leasing	Bala Cynwyd, PA	0	0	43,000	0	0	43,000
Jartran Truck & Trailer Rental	Miami, FL	12,000	0	19,000b	0	0	31,000
Hertz-Penske Truck Leasing	Parsippany, NJ	12,900	7900	4000	3000	0	27,800
Amtralease	Cherry Hill, NJ	7428	9433	5642	677	0	23,180
McDonnell Douglas Leasing (h)	Long Beach, CA	1900	2000	11,000	2100	600	17,750
Transamerica Trailer Services	Piscataway, NJ	0	0	15,700	0	0	15,700
All-State Vehicles, Inc	Long Island City, NY	800	0	0	13,000	0	13,800
Gelco Truck Leasing	Chesterfield, MO	3000	6700	3500	500	0	13,700
Ruan Leasing Co	Des Moines, IA	620	5515	6010	1000	0	13,145
Evans Products, Trans Div	Miami, FL	0	0	13,000	0	0	13,000
Transamerica Corp (d)	San Francisco, CA	200	0	6750	3200	0	10,180
AJF Leasing	St. Louis, MO	0	0	10,000	0	0	10,000
Trucklease Corp	Worcester, MA (j)	1787	643	642	5000	0	8072
Rollins Leasing Corp	Wilmington, DE	1700	4400	1900	0	0	8000
Saunders System, Inc	Birmingham, AL	1000	4000	3000	NA	0	8000
Farm Credit Leasing Services	Minneapolis, MN	1600	1200	2600	2100	NA	7500
PLM Transportation Equipment	San Francisco, CA	0	22	4600	0	0	4622
Transervice Lease Corp	Lake Success, NY	3200	262	581	0	120	4163
Chancellor Fleet Corp	Boston, MA	148	1925	2050	0	0	4123
Transportation Leasing Co	Tulsa, OK	980	43	50	2150	20	3243
Leslie Leasing Co	San Francisco, CA	650	60	55	2300	0	3065
Mendon Leasing Corp	Brooklyn, NY	2300	e	0	300	0	2600
Immke Circle Leasing	Columbus, OH	100	0	0	2195	0	2295
Lily Truck Leasing Corp	Boston, MA	1019	759	412	30	4	2224
United Truck Leasing Corp	Braintree, MA	1012	697	209	29	0	1947
Action Mobile Office Rentals	Gardena, CA	9	7	1900	7	6	1929
Leaseco Truck Rental	Nashville, TN	115	850	650	250		1750
Edart Truck Rental Corp	Hartford, CT	500	525	525	50	4	1604
Phill Baumgarten Motors, Inc (g)	Ft. Lauderdale, FL	272	441	720	47	0	1480
Gordon Thompson Industries	Jacksonville, FL	75	0	0	1300	0	1375
Highway Leasing Co	Needham, MA	50	0	0	1300	0	1350
DeCarolis Truck Rental	Rochester, NY	352	109	768	20	5	1254
Salem Leasing Corp	Winston-Salem, NC	67	443	6772	0	0	1182
Motor Transportation Co	St. Louis, MO	290	540	125	0	0	955
Equipment Maintenance Systems	Cincinnati, OH	459	87	104	141	57	848
Doerrs Trailer Leasing (f)	Orlando, FL	0	0	830	0	0	830
Commercial Equipment Co	Charlotte, NC	6	306	514	3	0	829
Carpet Center Leasing	Dalton, GA	19	293	496	12	0	820
Lease Line, Inc	N. Brunswick, NJ	40	127	589	8	0	764
HUB Truck Rental, NY Reg	Farmingdale, NY	623	95	0	22	0	740
Hunsaker Truck Lease, Inc	Dallas, TX	110	250	240	0	0	610
Rice & Holman Leasing	Pennsauken, NJ	200	0	0	400	0	600
Servitor, Inc	Ft. Lauderdale, FL	363	53	38	101	14	569

a—does not include foreign-based vehicles; b—utility-type vehicles only; c—does not include service fleet or car fleet; d—does not include Budget Rent-A-Car or Transamerica Interway trailer leasing; e—included in "Trucks;" f—regional fleet figures, not national; g—includes leasing division and vehicles operated by Baumgarten Transportation Co. Inc.; h—includes Brind Leasing Corp. vehicles; i—includes additional vehicles not specified; j—Trucklease cars controlled by Auto Rental Corp. Both are subsidiaries of Automotive Management, Inc.; NA—not available.

TRACTOR-TRAILER DRIVER AND MECHANIC WAGE RATES

(PTCA - A.T. KEARNEY)

Category	Company				Leased			
	Non-union		Union		Non-union		Union	
	1983	1984	1983	1984	1983	1984	1983	1984
Driver Wage Per Hour	$9.17	$9.19	$10.42	$10.36	$8.69	$8.89	$10.83	$11.02
95% Confid. Interv.	*.37	*.35	*.35	*.37	*.53	*.54	*.51	*.47
Per Mile Single	$0.24	$0.25	$0.26	$0.26	$0.24	$0.25	$0.26	$0.27
95% Confid. Interv.	*.01	*.01	*.01	*.01	*.01	*.02	*.02	*.01
Team	$0.15	$0.16	$0.15	$0.15	$0.14	$0.14	$0.14	$0.15
95% Confid. Interv.	*.01	*.01	*.01	*.01	*.01	*.01	*.01	*.01
Mechanic	$9.43	$10.06	$11.11	$10.91	$9.80	$15.78	$15.77	$15.96
95% Confid. Interv.	*.50	*.54	*.47	*.49	*3.09	*4.19	*7.10	*4.09

*—plus or minus

TRACTOR-TRAILER DRIVERS (PTCA - A.T. KEARNEY)

Driver Category	COST PER MILE									
	General and Administrative		Drivers		Equipment		Total*		95% Confidence Interval (plus/minus)	
	1983	1984	1983	1984	1983	1984	1983	1984	1983	1984
Company, non-union	$0.09	$0.08	$0.51	$0.51	$0.67	$0.68	$1.27	$1.27	$.07	$.07
Company, union	$0.08	$0.08	$0.64	$0.66	$0.69	$0.70	$1.39	$1.44	$.08	$.10
Leased, non-union	$0.06	$0.07	$0.44	$0.49	$0.60	$0.63	$1.11	$1.19	$.10	$.11
Leased, union	$0.07	$0.09	$0.56	$0.62	$0.62	$0.69	$1.25	$1.39	$.07	$.14

*—numbers may not add; They represent average costs for companies that provided information for the category shown.

TRACTOR-TRAILER EQUIPMENT (PTCA - A.T. KEARNEY)

Driver Category	COST PER MILE									
	General and Administrative		Drivers		Equipment		Total*		95% Confidence Interval (plus/minus)	
	1983	1984	1983	1984	1983	1984	1983	1984	1983	1984
Owned	$0.10	$0.10	$0.62	$0.61	$0.63	$0.65	$1.34	$1.35	$.08	$.08
Leased	$0.07	$0.07	$0.51	$0.54	$0.68	$0.69	$1.26	$1.28	$.05	$.06
Mixed	$0.08	$0.11	$0.61	$0.67	$0.65	$0.74	$1.33	$1.52	$.25	$.22

Type Equipment	Average Miles Per Trip		Average Miles Per Driver		Average Miles Per Tractor	
	1983	1984	1983	1984	1983	1984
Owned	578	701	67,900	70,200	84,900	84,900
Leased	1024	1037	80,900	83,400	105,300	109,600
Mixed	1210	751	78,400	69,200	82,000	82,500

*—numbers may not add; They represent average costs for companies that provided information for the category shown.

PRIVATE FLEETS

FOOD	Headquarters	Straight Trucks	Tractors	Trailers	Cars	Off-Highway	Total Vehicles	Annual Mileage (millions)	% Leased
ARA Services (a)	Philadelphia, PA	4920	2650	5700	2600	1135	17,005	423.8	NA
ITT Continental Baking	Rye, NY	9026	611	727	402	16	10,782	182.1	55
Safeway Stores	Oakland, CA	12	1897	3992	970	200	7071	109	0
Pepsi-Cola Bottling Group	Purchase, NY	1881b	1568	2012	467	772	6700	54	11
Nabisco Brands, USA	East Hanover, NJ	1600	70	125	4200	0	5995	120	10
Interstate Brands Corp	Kansas City, MO	4005	393	498	5	0	4901	98	0
Fleming Companies	Oklahoma City, OK	211	1257	2080	821	NA	4369	95	3
Carnation Co	Los Angeles, CA	1078	411	950	1500	NA	3939	32.5	.01
Super Valu Stores	Minneapolis, MN	9	1011	2149	552	93	3814	58	0
GCC Beverages, Inc	Chestnut Hill, MA	1453b	213	253	272	423	3350	33	0
Land O'Lakes, Inc	Minneapolis, MN	485	270	510	908b	800	2973	NA	80
Sysco Corp	Houston, TX	809	606	685	713	0	2813	70	13
American Bakeries Co	New York, NY	2150	247	325	NA	0	2722	53	6
The Southland Corp	Dallas, TX	868	700	851	0	0419	2419	56	7
General Mills	Minneapolis, MN	257	44	200	1846	0	2347	35	10
Wakefern Food Corp	Elizabeth, NJ	0	400	1500	250	0	2150	25	c
Holly Farms Poultry Ind	Wilkesboro, NC	208	416	749	184	272	2098	37	0
Wetteran, Inc	Hazelwood, MO	20	570	936	517	2	2045	22	2
General Foods Corp	White Plains, NY	0	41	224	1725	0	1990	6e	2
Stroehmann Bakeries, Inc	Williamsport, PA	1061	204	322	189	0	1776	36	30
Tyson Foods, Inc	Springdale, AR	152	352	642	445b	68	1659	22	.4
Campbell Taggart, Inc	Dallas, TX	50	658	850	100	0	1658	42	30
Arnold Foods	Greenwich, CT	1200	95	120	160	NA	1575	36.5	4
Acme Markets	Philadelphia, PA	12	254	1074	150	0	1490	10.5	NA
Beverage Management	Columbus, OH	450	239	345	450	0	1484	25.9	20
Giant Food, Inc	Landover, MD	215	192	1019	32	0	1458	13	0
Entenmann's, Inc	Bay Shore, NY	925	10	105	240	5	1285	30	0
Houston Coca-Cola Bottling	Houston, TX	193b	169	208	188	161	1270	13	0
Pacific Gamble Robinson (d)	Kirkland, WA	592	138	151	252	116	1249	17.7	0
Beatrice Foods, Bottled Water Div	Los Angeles, CA	927	47	70	72	100	1216	37.5	50
Foremost Dairies, Inc	San Francisco, CA	490	200	250	150	NA	1090	NA	0
HE Butt Grocery Co	Corpus Christi, TX	9	193	687	198	0	1087	NA	0
Stop & Shop Companies	Boston, MA	2	158	782	85	0	1027	23	39
Central Soya Co	Fort Wayne, IN	77	137	239	324	205	982	13	86
Thomas J Lipton, Inc	Englewood Cliffs, NJ	100	3	10	850	6	969	18	0
Northrup King Co	Minneapolis, MN	352	3	35	190	350	903	15	0
Hartz Mountain Corp	Harrison, NJ	560	30	40	270	0	900	33	80
Metz Baking Co	Sioux City, IA	658	67	79	65	0	869	17.5	0
US Sugar Corp	Clewiston, FL	514	23	41	287	0	868	NA	0
Vons Grocery Co	El Monte, CA	47	199	560	2	0	808	11	0
Martin Brower Co	Des Plaines, IL	0	302	491	15	NA	808	35	85
Drake Bakeries, Inc	Wayne, NJ	620	18	38	44	0	720	9.3	0
Sweet Life Foods	Suffield, CT	4	130	280	295	9	718	12	20
Coca-Cola Bottling of MI	Lansing, MI	62	239	239	125	2	667	4	.1
Peter Eckrich & Sons	Fort Wayne, IN	340	36	63	200	0	639	17	0
Armour Food Co	Omaha, NE	99	80	89	312	0	580	19.6	45
Pepperidge Farm, Inc	Norwalk, CT	15	101	154	277	3	550	15.5	100
Chas Freihofer Baking	Troy, NY	386	21	54	46	21	528	8	0

*—does not include cars; a—includes Smith's Transfer, magazine/book division and school bus operations; b—includes pick-up trucks; c—100% of tractors & 20% of trailers; d—not including wholly-owned-subsidiary fleets; e—trucks only; f—80% tractors & 8% trailers leased; NA—not available

Circle 54 on Inquiry Card →

SINGLE SOURCE and TRIP LEASING (PTCA - A.T. KEARNEY)

	SINGLE SOURCE DRIVER AND EQUIPMENT LEASING					
	Presently Do		Would Consider-'83; Plan To-'84			
Trucking Operation	Number 1984	% Total 1984	Number 1983	1984	% Total 1983	1984
Tractor-Trailer	47	11%	142	20	61%	7%

	TRIP LEASING TO ICC-REGULATED CARRIER					
	Presently Do		Would Consider-'83; Plan To-'84			
Trucking Operation	Number 1984	% Total 1984	Number 1983	1984	% Total 1983	1984
Tractor-Trailer	113	26%	183	29	69%	13%

TRANSPORTATION SUBSIDIARY (PTCA - A.T. KEARNEY)								
	Presently Have				Plan To			
	Number		% Total		Number		% Total	
	1983	1984	1983	1984	1983	1984	1983	1984
Tractor-Trailer	61	75	17%	17%	17	12	9%	5%
Mixed Fleet	3	8	5%	12%	2	4	5%	11%
Straight Truck/Van	1	1	4%	7%	1	0	4%	0%

TRACTOR-TRAILER COST PER MILE BY REGION (PTCA - A.T. KEARNEY)

Region	General/ Administrative		Drivers		Equipment		Total*		95% Confidence Interval (plus or minus)	
	1983	1984	1983	1984	1983	1984	1983	1984	1983	1984
Rocky Mountain	$.09	$.08	$.56	$.55	$.65	$.66	$1.29	$1.28	$.06	$.08
Southwest	$.08	$.07	$.50	$.50	$.62	$.63	$1.20	$1.21	$.04	$.04
Northern Plains	$.08	$.08	$.52	$.52	$.64	$.65	$1.22	$1.24	$.04	$.04
Midwest	$.08	$.08	$.52	$.53	$.63	$.66	$1.22	$1.26	$.04	$.04
Southeast	$.07	$.07	$.49	$.48	$.61	$.63	$1.17	$1.19	$.04	$.03
Middle Atlantic	$.08	$.08	$.51	$.53	$.64	$.66	$1.22	$1.27	$.04	$.04
Northeast	$.08	$.08	$.50	$.51	$.63	$.65	$1.21	$1.24	$.04	$.05
Continental USA	$.08	$.08	$.51	$.50	$.62	$.64	$1.22	$1.21	$.06	$.06
Canada	$.07	$.08	$.49	$.48	$.64	$.63	$1.20	$1.18	$.08	$.04

*—numbers may not add; They represent average costs for companies that provided information for the category shown.

PRIVATE FLEETS

PUBLIC UTILITIES	Headquarters	Straight Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Annual Mileage (millions)	% Leased
GTE Service Corp	Irving, TX	25,700c	150	725	8410	NA	34,985	380	8
Bell South Corp	Atlanta, GA	21,860	68	NA	6274	NA	28,202	302	NA
Southwestern Bell Telephone	St. Louis, MO	15,956c	6	NA	5257	NA	21,219	168	4
Pacific Bell	San Francisco, CA	13,698	84	NA	3919	NA	17,701	156	0
Pacific Gas & Electric	San Francisco, CA	8700	100	3800	2900	80	15,500	NA	0
New England Telephone	Boston, MA	5497c	14	18	2100	0	7629	81	4
Southern California Edison	Pomona, CA	3328	75	783	1954	663	6803	56	100
Florida Power & Light	Miami, FL	1543	50	723	3600	757	6673	NA	2
Southern California Gas Co	Los Angeles, CA	4310	12	298	1409	508	6537	52	100
Duke Power Co	Charlotte, NC	2500	80	1150	1020	950	5700	60	0
General Public Utilities	Parsippany, NJ	2466	26	1127	1334	613	5566	44	50
Consumers Power Co	Jackson, MI	2987	40	913	792	518	5250	42	80
Public Service Elec & Gas	Newark, NJ	2407a	9	572	1710	235	4933	34.5	0
Niagara Mohawk Power Corp	Syracuse, NY	2643	53	807	692	496	4691	9.1	97
American Electric Power	Columbus, OH	2780	27	71	1285	395	4558	55	97
Commonwealth Edison	Maywood, IL	1795	47	719	1653	169	4383	45	1
Con Edison of NY	Astoria, NY	2576	25	199	1097	433	4330	5	0
AT&T Information Services	Denver, CO	180	2	2	4000	20	4204	NA	0
Columbia Gas Distribution	Columbus, OH	1873	8	214	888	611	3594	41	100
N Indiana Public Service	Hammond, IN	1895	19	701	641	NA	3256	20	.07
Pennsylvania Power & Light	Allentown, PA	1350	65	565	950	250	3190	2	100
S New England Telephone	New Haven, CT	1778	6	200	1203	NA	2987	28	0
Long Island Lighting	Hicksville, NY	1363	13	445	784	380	2985	14	.002
Public Service Co of CO	Denver, CO	1554	17	519	451	339	2880	23.7	0
Detroit Edison	Detroit, MI	1400	60	600	450	225	2820	30	80
Philadelphia Electric	Berwyn, PA	1420	19	467	762	23	2691	18	100
Central Telephone Co	Chicago, IL	1868	0	75	656	60	2659	27	2
ARKLA, Inc	Shreveport, LA	1524	51	650	406	NA	2631	33	0
Baltimore Gas & Electric	Baltimore, MD	920	23	30	1475	19	2467	22	27
San Diego Gas & Electric	San Diego, CA	1340	60	286	644	133	2463	24	0
NY State Electric & Gas	Binghamton, NY	1326	16	292	504	321	2459	21	58
Arizona Public Service Co	Phoenix, AZ	1392	34	366	367	284	2443	17	5
Arizona Public Service	Phoenix, AZ	1272	29	320	334	351	2306	16	5
Illinois Power	Decatur, IL	1023	5	483	378	333	2222	12	0
Northern States Power Co	Minneapolis, MN	1473	11	350	238	15	2087	14	0
General Telephone of NW	Everett, WA	1374a	12	88	638	NA	2024	19.5	5
Appalachian Power Co	Roanoke, VA	1040	7	349	436	180	2012	21	98
Jersey Central Power & Light	Morristown, NJ	948b	8	435	423	183	1997	15	95
Northern Illinois Gas	Naperville, IL	989	3	215	491	281	1979	24	0
Cincinnati Gas & Electric	Cincinnati, OH	813	13	338	567	184	1915	16	0
Oklahoma Gas & Electric	Oklahoma City, OK	940	25	322	222d	325	1834d	16	0
Gen Telephone Co of Indiana	Ft. Wayne, IN	1113	7	158	408	111	1797	17	0
Pacific Power & Light	Portland, OR	1168	7	325	264	0	1764	NA	85
Illinois Bell Telephone Co	Springfield, IL	255	96	406	943	0	1700	NA	0
Salt River Project	Phoenix, AZ	921	19	205	273	273	1691	14.1	0
Michigan Consolidated Gas	Detroit, MI	958	6	73	501	126	1664	19	0
Memphis Light, Gas & Water	Memphis, TN	805	10	183	233	278	1509	11	0
Public Service Indiana	Plainfield, IN	721	8	391	275	103	1498	15	85

*—does not include cars; a—includes vans; b—includes 464 pick-up trucks; c—includes vans and light trucks; d—does not include contract cars; NA—not available.

PRIVATE FLEETS

PRIVATE FLEET OPERATING COSTS (PTCA - A.T. KEARNEY)

Cost Category	Tractor-Trailer Cost Per Mile 1983	1984
General And Administrative	$0.08	$0.08
Drivers	$0.55	$0.57
Equipment	$0.66	$0.68
Total*	$1.29	$1.32
Sample Size	347	419
95% Confidence Interval**	$1.25 to $1.33	$1.27 to $1.37

*—numbers may not add. They represent average costs for those companies that provided information for the category shown; **—with 95% confidence, the average will fall within the range shown.

PRIVATE FLEET OPERATING COSTS (PTCA - A.T. KEARNEY)

Cost Category	COST PER MILE* Straight Truck/Van 1983	1984	Mixed Fleet 1983	1984
General/Administrative	$0.14	$0.16	$0.11	$0.14
Drivers	$0.74	$1.22	$0.66	$0.82
Equipment	$0.53	$0.77	$0.64	$0.72
Total**	$1.43	$2.15	$1.40	$1.66
Sample Size	23	11	48	57
95% Confidence Interval	$1.08 to $1.78	$1.03 to $3.27	$1.26 to $1.54	$1.44 to $1.88

*—because of small sample size and fleet definition, care should be taken when referencing these operating costs; **—numbers may not add. They represent average costs for companies that provided information for the category shown.

INTERCORPORATE AND TOTO AUTHORITY (PTCA - A.T. KEARNEY)

Trucking Operation	NUMBER OF RESPONDENTS Participate In Intercorporate Hauling			
	Number		% Total	
	1983	1984	1983	1984
Tractor-Trailer	160	214	45%	49%
Mixed Fleet	18	25	33%	38%
Straight Truck/Van	4	4	14%	27%

	TOTO AUTHORITY							
	Presently Have				Applying For			
	Number		% Total		Number		% Total	
	1983	1984	1983	1984	1983	1984	1983	1984
Tractor-Trailer	69	118	19%	27%	42	44	22%	20%
Mixed Fleet	7	6	13%	9%	5	5	13%	13%
Straight Truck/Van	1	1	4%	7%	0	0	0%	0%

PRIVATE FLEETS

[illegible]	Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Annual Mileage (millions)	% Leased
LA Dept Water/Power, CA	2900	39	344	1212	979	5474	50	0
Atlanta, GA	953	38	134	1385b	2652	5126	NA	NA
Phoenix, AZ	1749	225	199	1520	539	4232a	33.5	0
Dallas, TX Equip Services Dept	1467	40	127	1462b	379	3544a,c,i	42	0
San Francisco, CA	901	29	15	1024b	1255	3225	NA	0
Baltimore, MD	1312	15	13	1400c	385	3125	NA	0
Cleveland, OH	1226	6	126	1026c	701	3032	16	0
Austin, TX	1048e	38	161	742c	532	2521	7.5	0
San Antonio, TX	1105	33	42	790	402	2372	35	0
Kansas City, MO	1123	59	27	620	402	2231	NA	0
Charlotte, NC	365	2	2	820	128	1709a	15.5	0
Baton Rouge, LA	670	10	55	740	140	1615	NA	.03
Long Beach, CA	582	3	70	601	248	1504	NA	0
San Diego, CA	1100	50	75	90	100	1415j,l	12	0
San Jose, CA	372	7	67	583a	264	1384b,g	11.5	0
Norfolk, VA	570	5	26	450	300	1350	7	0
Anaheim, CA	340	1	86	315	585	1327	5	9
Lexington, KY	403	61	11	585	251	1311	9	.5
Salt Lake City, UT	320	235	40	400b	297	1292	7	0
Sacramento, CA	337	5	100	767f	150	1268	10.7	.3
Corpus Christi, TX	601n	16	54	356p	149	1225o	14.5	0
Louisville, KY	415	70	18	541	180	1224	NA	NA
Honolulu, HI	715	18	65	256	80	1134	NA	0
Clearwater, FL	313	11	57	219	485	1123a	4	0
Greensboro, NC	217g	6	115	508a	256b	1121	10	0
Newport News, VA	497	2	86	367	164m	1116	NA	0
Jackson, MS	450	20	20	500	125	1115	NA	0
Tallahassee, FL	544	8	100	229	202	1083	8.7	0
Riverside, CA	488	2	91	197	166	1051a,b,c	NA	0
LA, CA Fire Dept	513	75	75	304	10	977	NA	0
Lubbock, TX	237e	50	169	361b	287	969	7	0
Pontiac, MI	188	1	28	170	573a	960b,c,d	NA	.007
El Paso, TX	560	12	15	55	280a,h	922	NA	0
Raleigh, NC	375	50	63	318	108	914	7.8	0
Orlando, FL	398	61	50	360	27	896	NA	0
Shreveport, LA	293	39	26	423	97	878	NA	0
Winston-Salem, NC	347	3	26	383	118	877	7	0
Knoxville, TN	366	5	22	347	117	857	14	0
Rochester, NY	340	1	29	345	98	813j	7	0
Portsmouth, VA	241	35	30	232	270	808	NA	0
Hampton, VA	287	2	13	240b	155	795a	NA	0
Savannah, GA	358	1	1	318	88	766	NA	0
Ft. Lauderdale, FL	300	10	30	325	90	750	9	0
Little Rock, AR	323	2	11	265c	135	736	5	0
Roanoke, VA	300	10	20	204	157	691k	NA	0
Montgomery, AL	317	13	13	299	43	685	NA	0
Coral Gables, FL	149	6	7	145	266	598	2.2	0
Chesapeake, VA	160	3	18	340	125	646	7	0

*—does not include cars. #—may not include all departments. a—includes miscellaneous vehicles; b—includes police fleet; c—includes motorcycles; d—does not include education or fire dept; e—includes fire trucks; f—includes 340 light trucks; g—does not include water or fire dept; h—does not include fire, police, health or water depts; i—does not include public transit or fire dept; j—does not include fire dept; k—does not include school bus fleet; l—does not include police dept; m—includes street maintenance equipment; n—includes 288 pick-ups and 17 fire trucks; o—includes 49 buses; p—includes 10 ambulances. NA—not available.

PRIVATE FLEETS

STATE GOVERNMENT*	Headquarters	Straight Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Annual Mileage (millions)	% Leased
New Mexico DOT	Santa Fe	401,175	NA	66,470	788,393	NA	1,342,612	NA	NA
North Carolina DOT/Hwy Div	Raleigh	5542	101	862	0	11,641	18,146	65	0
Texas Hwy & Public Trans	Austin	6339	117	170	1231	9458	17,315	91	0
California DOT	Sacramento	4733	75	295	3069	4186	12,795	NA	0
Massachusetts Motor Vehicle Management Bureau	Boston	3486	0	0	3311	2628	9425	NA	0
Pennsylvania DOT	Harrisburg	4362	58	235	708	3836	9199	NA	0
Virginia Hwy & Trans Dept	Richmond	3780	55	65	2500	2730	9130	NA	0
Georgia DOT	Atlanta	1389	54	375d	632	6521	8971	NA	0
Kentucky Trans Cabinet	Frankfort	6000	15	25	1592	500	8132	76	0
Florida DOT	Tallahassee	2961a	59	364	144T	2671	7496	63	0
New York DOT	Albany	2294	72	329	2325	1912	6932	56	0
Ohio DOT	Columbus	3500	25	25	1200	1200	5950	6	0
Missouri DOT/Hwy Dept	Jefferson City	2431b	8	16	610	2783	5848	NA	0
Michigan Management/Budget Dept, Motor Trans Div	Lansing	575	8	4	4483	7	5073	NA	0
South Carolina Hwy/Public Trans	Columbia	2611	162	349	1664	0	4786	NA	0
Oregon DOT/Hwy Div	Salem	945	34	241	1132c	2357	4709	18.5	0
Illinois DOT	Springfield	3175c	12	300	821	0	4308	59	0
Indiana Hwy Dept	Indianapolis	1146	16	15	1728b	934	3839	42	0
Iowa DOT	Ames	2112	12	12	507	886	3529	22	0
D.C. Dept of Pub Works	Washington	1810	40	400	250	200	2700	1	1
New Jersey DOT	Trenton	1229	7	6	702	712	2656	27	20
Kansas DOT	Topeka	1262	17	68	250	1000	2597	NA	0
Maryland Hwy Admin	Baltimore	950	14	16	250	1000	2230	NA	0
Arizona DOT	Phoenix	545	20	75	1125a	450	2215	24	0
Minnesota DOT	St. Paul	1000a	40	150	310	700	2200	NA	0
Connecticut DOT	Wethersfield	1289	35	55	420	325	2124	NA	0
Montana Hwy Dept	Helena	1103b	35	154	81	565	1934	14	0
West Virginia Hwy Dept	Charleston	677	19	194	404	593	1887	NA	0
Utah DOT	Salt Lake City	1077a	12	84	215	399	1787	22	0
Massachusetts Dept of Pub Works	Boston	650	3	6	438	500	1597	NA	0
South Dakota DOT	Pierre	912	9	65	132	476	1575	NA	0
Wisconsin Dept of Admin	Madison	5	0	0	1495	0	1500	27	0
Idaho DOT	Boise	1015a	17	227	232b	NA	1491	22	0
Maine DOT/Motor Trans Ser	Augusta	239	15	6	453a	197	939	18	0
Delaware DOT	Dover	339	10	12	231	341	933	NA	0
New Hampshire Hwy Pub Works	Concord	494b	2	8	204	131	839	10	0
Nevada Highway Patrol	Carson City	13b	NA	3	194	2	212	4	0

*—does not include cars. #—may not include all departments. a—includes 293 pickup trucks. b—includes pick-ups and vans. c—includes pick-up trucks, vans and miscellaneous vehicles. d—includes 225 utility trailers. NA—not available

PRIVATE FLEETS

PETROLEUM	Headquarters	Straight Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Annual Mileage (millions)	% Leased
Phillips Petroleum	Bartlesville, OK	3704	146	1030	1237	1483	7600	NA	0
Tenneco, Inc	Houston, TX	3000f	200	450	3800	150	6100	NA	75
Dowell Schlumberger	Houston, TX	1500	1000	1150	2000a	NA	5670	6.5	NA
Conoco Inc	Houston, TX	0	365	650	2500		3515	42.7	0
Arco Oil & Gas	Dallas, TX	1123	24	374	1049	496	3066	39	0
Petrolane, Inc	Long Beach, CA	2550	115	180	200	0	3045	NA	14
Big Three Industries, Inc	Houston, TX	1086	775	640	NA	NA	2501	7	0
Gulf Oil Mkt Dept (g)	Houston, TX	136	361	446	1275	72	2290	b	0
Exxon Co USA	Houston, TX	355	294	321	761	0	1731	NA	0
Texaco Refining & Mkt, Inc	Houston, TX	75	182	243	923	NA	1423	28	98
Amerigas, Inc	Valley Forge, PA	400	120	180	300	0	1200	22	30
Welltech, Inc	Houston, TX	670	46	53	107	320	1196	30.7	60
Transco Energy Co	Houston, TX	455	14	106	460	50	1085	15	0
Natural Gas Pipeline Co of Am	Lombard, IL	589	9	105	361	0	1064	14	0
Sun Refining & Mkt Co	Philadelphia, PA	92	162	272	400	56	982	69.7d	5
Mobil Oil Corp (c)	Fairfax, VA	36	316	404	0	171	925	23	1
Halliburton Services	Wichita, KS	75	169	350	91	86	891	NA	0
Meenan Oil Co	Hicksville, NY	490	40	35	94	6	665	NA	0
Union Oil Western Region Mkt	Los Angeles, CA	71	88	90	36o	0	609	17	0

*—does not include cars, a—includes pick-up trucks, b—trucks: 42 million cars: 40 million, c—marketing dept only, d—trucks only, f—includes light trucks and vans, g—acquired by Chevron, NA—not available

FEDERAL GOVERNMENT*	Trucks & Tractors	Cars & Station Wagons	Ambulances	Buses	Total Vehicles
US Postal Service	113,150	11,054	0	9	124,213
General Services Administration (a)	32,318	49,220	158	2854	84,550
Army	35,443	11,082	997	3234	50,756
Air Force	38,576	5258	996	2116	46,946
Agriculture Department	26,258	4401	1	46	30,706
Navy	23,060	3402	625	1005	28,092
Interior Department	12,370	1879	12	252	14,513
Justice Department	2851	9702	6	120	12,679
Department of Energy	9717	2005	58	264	12,044
Treasury Department	944	6045	0	11	7000
Civil Works, Corps of Engineers	6101	866	3	17	6987
Marine Corps	4870	621	0	270	5761
Tennessee Valley Authority	2800	1259	15	0	4074
Labor Department	1392	546	25	75	2038
State Department	1022	872	7	0	1901
National Aeronautics & Space Admin	931	222	14	10	1177

a—most vehicles are in Interagency Motor Pool and rented or leased to other government fleets. There is no duplication with other fleets listed, *—source: General Services Administration Report, printed 1984

Attention Private Carriers:

Companies that operate 300 or more vehicles and wish to be considered for inclusion in CCJ's 1986 list of private fleets should mail a self-addressed envelope to: Fleet List, CCJ, Chilton Way, Radnor, Pa. 19089-0060. Your return envelope will be used to forward a questionnaire.

Carriers wishing to participate in the next PTCA-sponsored study of private fleet costs should contact Pat Malloy, A.T. Kearney, Inc., 222 S. Riverside Plaza, Chicago, Ill. 60606 or call 312-648-0111. Participants will receive survey results free of charge, and a detailed summary of their operation.

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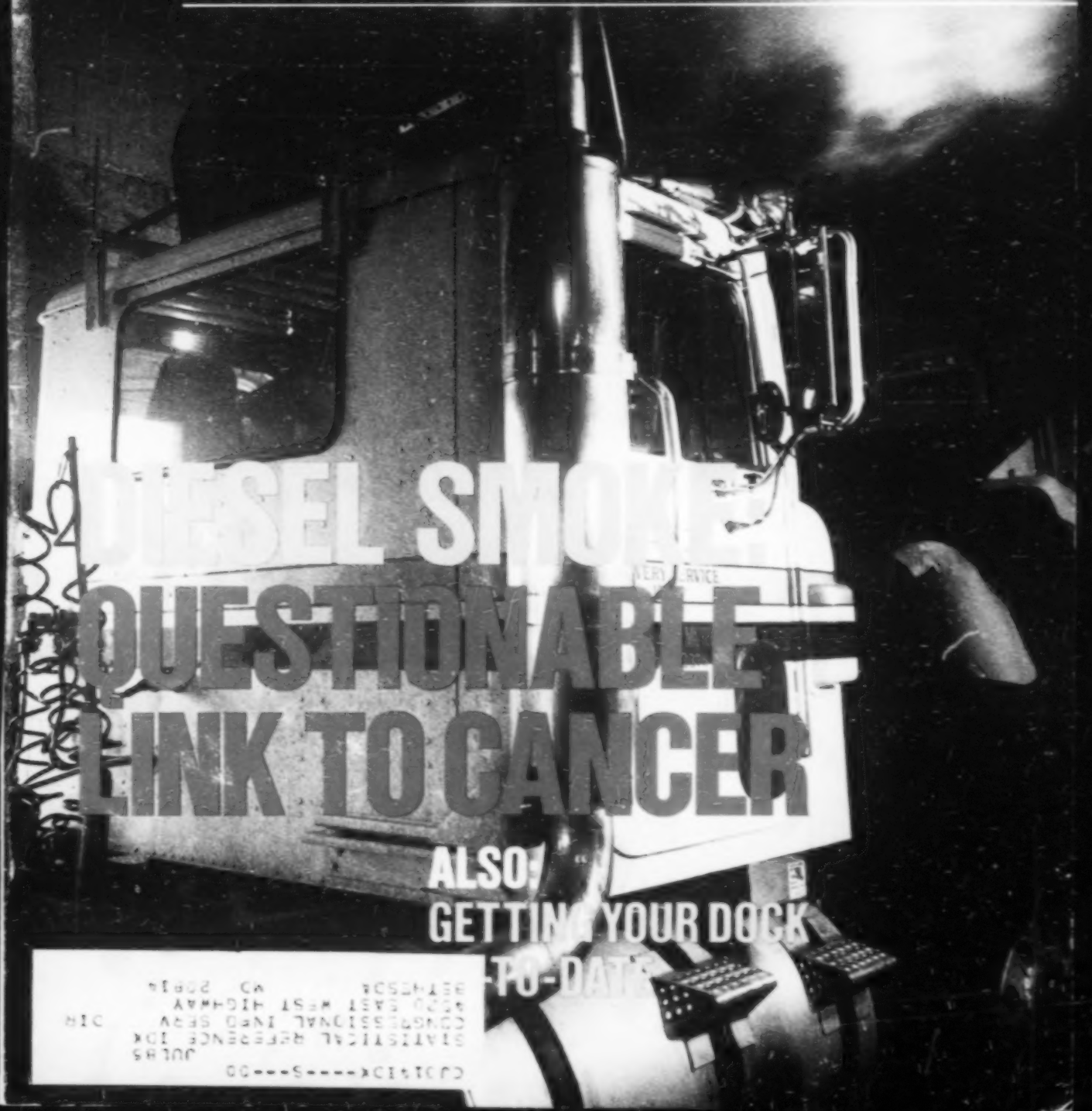

DIESEL SMOKE QUESTIONABLE LINK TO CANCER

ALSO:

GETTING YOUR DOCK UP-TO-DATE

COMMERCIAL CARRIER JOURNAL

Published As Commercial Car Journal Continuously Since 1911
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VOLUME 142 NUMBER 8 AUGUST 1985

ATA THINKS ABOUT PR

American Trucking Associations has adopted a PR campaign that is sure to be controversial. It includes driver "ambassadors" who will be instructed on how to dress, talk and look in public. Whether any self-respecting truck driver would volunteer for the program as outlined remains to be seen. ATA announced only highlights of the campaign, but CCJ's Washington Bureau received a copy of the complete program. Details can be found on page 18.

Chilton

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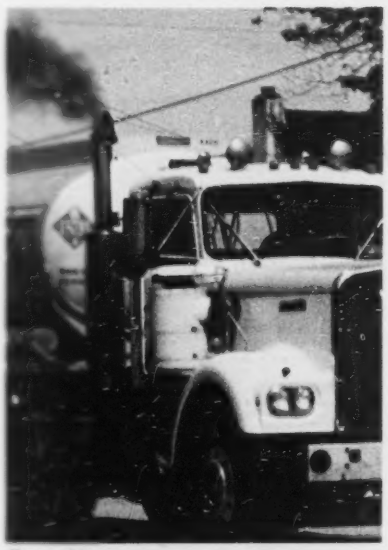

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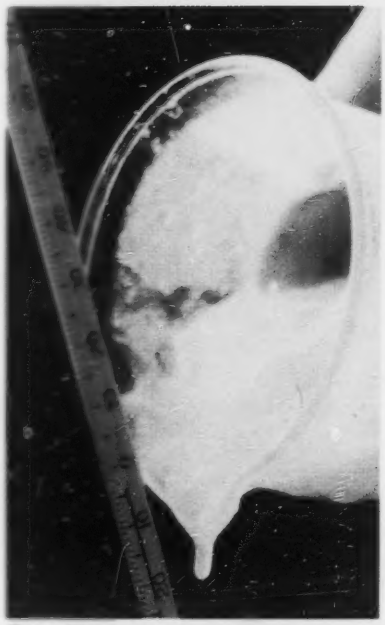

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IS DIESEL EXHAUST DEADLY?

The health and welfare of countless truck and bus drivers, mechanics and dock workers may be in jeopardy if the allegations of the EPA concerning diesel smoke and cancer are correct. A look at the mounting controversy and its life-or-death consequences for the nation's motor carrier industry **62**

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IS
DIESEL
EXHAUST

DEADLY?

By **RICH CROSS**,
Senior Technical Editor

If diesel exhaust causes lung cancer, as the Environmental Protection Agency claims, are the lives of countless truck and bus drivers, mechanics and dock workers in serious jeopardy?

Anyone who spends lots of time around diesel trucks or buses is breathing an atmosphere laced with tiny specs of exhaust soot. Whether this soot is carcinogenic, increasing the risk of lung cancer, is an unresolved, life-or-death question.

By the year 2000, based on the current rate of dieselization, truck and bus emissions may increase the nation's incidence of lung cancer by as much as 15%, according to members of the Colorado Department of Health's Air Pollution Control Division.

This forecast is based on the fact that diesels typically emit 30 to 50 times more soot than a gasoline engine equipped with a catalytic converter. And there's no question that exhaust soot contains tiny, easy-to-inhale specs of carbon which harbor a variety of cancer-causing agents. One such agent is benzo(a)pyrene, which is also found in cigarette smoke.

The first indication that diesel exhaust might cause cancer was provided by a laboratory test conducted in the mid-1950s. In this test, material extracted from diesel soot with a solvent was applied to the skin of mice. Many of the rodents developed cancer, which created concern among environmentalists.

In subsequent years, researchers exposed everything from bacteria to beagles to whole diesel exhaust, particles of soot filtered from whole exhaust, and soot extracts. The results of these tests were varied and conflicting.

In general, however, lab animals forced to breath whole diesel exhaust did not contract cancer, while those exposed to extracts from diesel soot often fell prey to the dreaded disease. Why the discrepancy?

One explanation is that whole diesel exhaust, diluted by ambient air, has an extremely low concentration of cancer-causing agents. In addition, while some soot may be retained in the lungs, there's widespread speculation that most of it is excreted in bronchial mucus before it can cause damage.

Some scientists speculate that cancer-causing agents cling so tenaciously to diesel soot that body fluids are incapable of extracting a harmful dose. Illustrating this point, a capsule of cyanide can be swallowed without harm if the capsule doesn't dissolve.

While there is no conclusive proof that trucking industry employees have an unusually high risk of cancer, EPA disagrees. In fact, the agency's Acting Administrator for Air and Radiation, Charles Elkins, estimates that diesel exhaust causes up to 800 cancer cases per year.

Concern surfaces in '77

Because cancer-related studies of diesel exhaust were conducted without fanfare, the industry was not made aware of a potential problem until 1977, when amendments to the Clean Air Act called upon EPA to study the health effects of vehicle exhaust.

At that time, EPA issued a warning to researchers that "precautionary measures be taken to minimize human exposure to concentrated diesel exhaust." The EPA's warning, based on evidence that diesel exhaust was mutagenic to certain bacteria, was interpreted to imply a cancer risk to man. ATA protested loudly, focusing industry attention on the controversy.

Central to EPA's study of the health effects of diesel emissions was a contract with the National Research Council, a non-profit organization established in 1916 by the National Academy of Sciences. In 1980, having evaluated stacks of existing studies, NRC labeled almost all of them either "defect-

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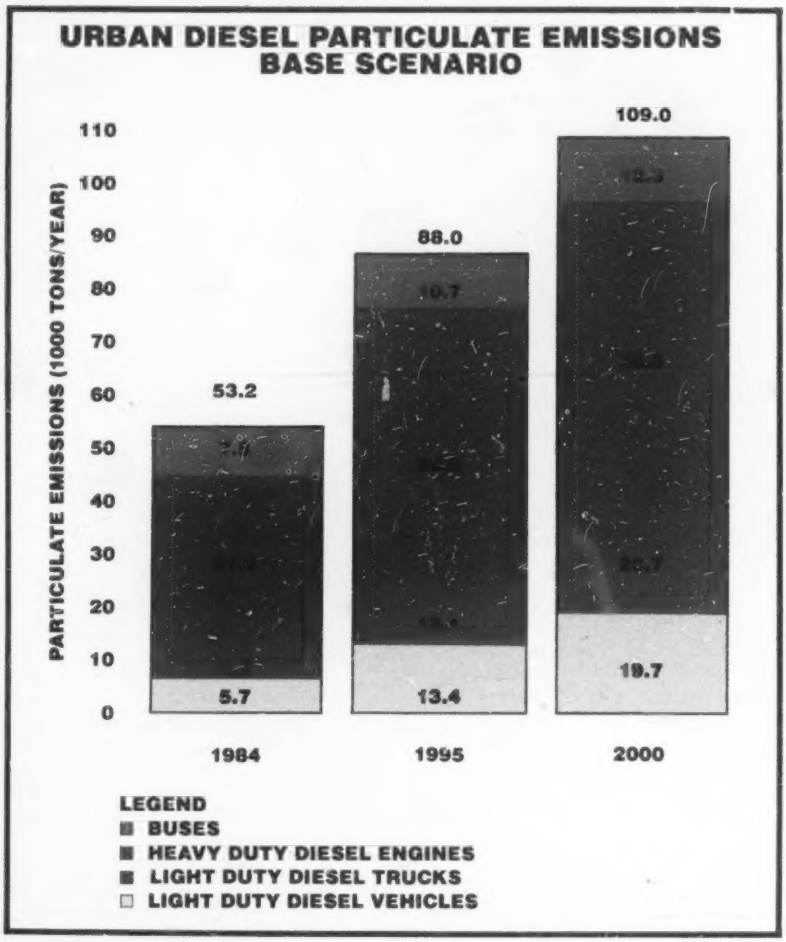


Left: Chart reflects EPA estimate that *without* heavy-duty-diesel particulate standards, urban soot would double by the year 2000. Current standards for heavy trucks and buses will decrease soot by 46%, EPA claims, thereby reducing the alleged cancer risk to city dwellers.

Below: ATA environmental specialist James Barr says EPA has no conclusive proof that diesel soot causes cancer. Yet EPA's warning of a cancer risk could easily be interpreted to imply truck and bus industry liability for thousands of employee deaths.

tive" and/or "inconclusive."

In its report to EPA, NRC said: "There's no convincing evidence that inhaled whole diesel exhaust is mutagenic or carcinogenic in laboratory animals..."

It added: "Adverse health effects on humans have not been conclusively demonstrated.

"Such scientific uncertainty about health effects poses a dilemma for policy makers who need to assess the health risks of exposure to diesel engine exhaust before making decisions and setting standards," NRC stated.

NRC's admonition fell on deaf ears, according to ATA environmental specialist James Barr. In the *Federal Register*, Oct. 15, 1984, EPA cited "a small potential cancer risk associated with inhalation of diesel particulate matter."

American Trucking Associations reacted to the EPA statement, branding the cancer risk assessment as patently "irresponsible."

Responding to ATAs' criticism, EPA said on March 15, it "still believes the risk is small but significant... A serious environmental concern."

EPA bases its risk assessment on a "comparative potency analysis" of diesel soot extracts and materials (such as cigarette smoke, roofing tar and coke-oven effluent) proven to cause lung cancer in humans, according to Richard Rykowski, senior project manager, EPA standards development and support branch.

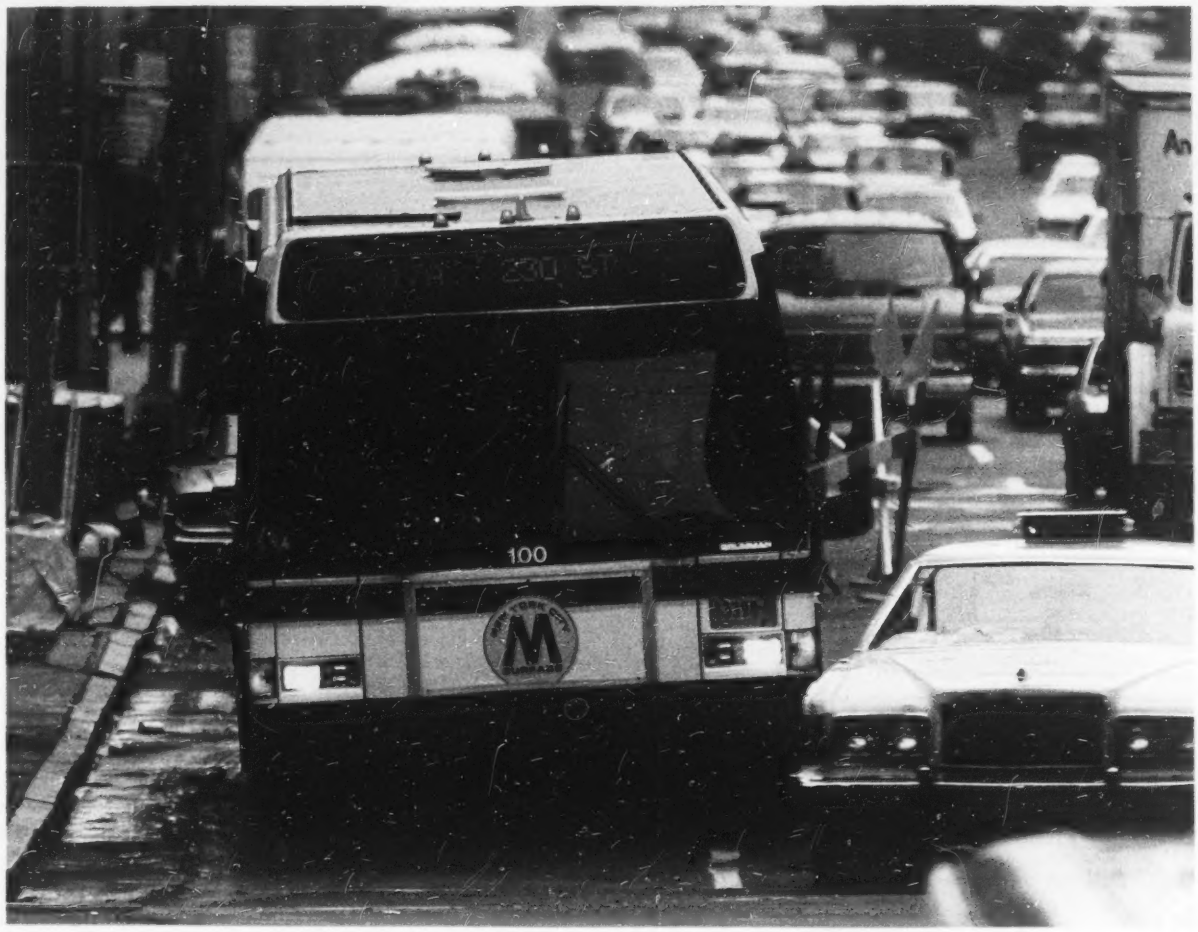
Who, or what, should the trucking industry believe? ATA fears that, left unchallenged, EPA's allegations could easily be interpreted to imply industry liability for thousands of past and future lung cancer deaths.

"Our industry is very concerned over this issue and is alarmed at EPA's approach," Barr says. "The agency has apparently placed policy before science by assuming diesel exhaust causes cancer in humans."

No positive proof?

ATA is not alone in its fears. General Motors Corporation also has questioned EPA's foundation for ascribing a cancer risk. That concern is shared by Dr. Richard Bates, Senior Staff Scientist of the Health Effects Institute (HEI), of Cambridge, Mass.

Created in 1980 to assess the health effects of vehicle emissions,



New urban buses must comply with particulate limits in 1991 not imposed upon heavy-duty trucks until 1994, because urban buses are used exclusively in densely-populated areas and operate in a stop-and-go fashion.

HEI receives 50% of its funding from EPA and the other 50% from the automotive industry. According to Dr. Bates, no conclusive proof of a cancer risk associated with diesel particulates has been documented.

He says current HEI research focuses primarily on the nitropyrenes in soot, which have proven carcinogenic when injected under the skin of a rat.

But, contrary to a famous statement by actor James Cagney, people are far removed from "dirty rats" in terms of susceptibility to cancer, according to Barr.

HEI literature supports Barr's observation to the extent "there may not be exact disease counterparts in laboratory animals in man."

Approximately 70% to 90% of all lung cancer in U.S. males is directly attributed to cigarettes, not diesels, Barr says.

Because cigarettes are considered carcinogenic, Dr. Kyle Steenland of the National Institute for Occupational Safety & Health (NIOSH) says studies attempting to link lung cancer with occupational exposure to diesel exhaust *must* consider the victims' smoking habits if they are to be considered valid.

Dr. Steenland says a study of 500 lung cancer victims in diesel-exposed occupations published by researchers Hall and Wynder in 1984, after adjustment for cigarette smoking, showed "no significant risk."

Attempting to resolve the relationship between diesel soot and cancer, NIOSH has embarked on a major research effort in cooperation with the National Cancer Institute and with the International Brotherhood of Teamsters.

The NIOSH study is scheduled for completion in less than two years. It's based on the death records and smoking habits of 10,000 teamsters in the Central States region who died in 1982 and 1983. Sixty-nine percent of this group were truck drivers, 5% dock workers, 6% mechanics and the balance of 20% were engaged in non-transportation-related activities.

As its initial task, NIOSH is ran-

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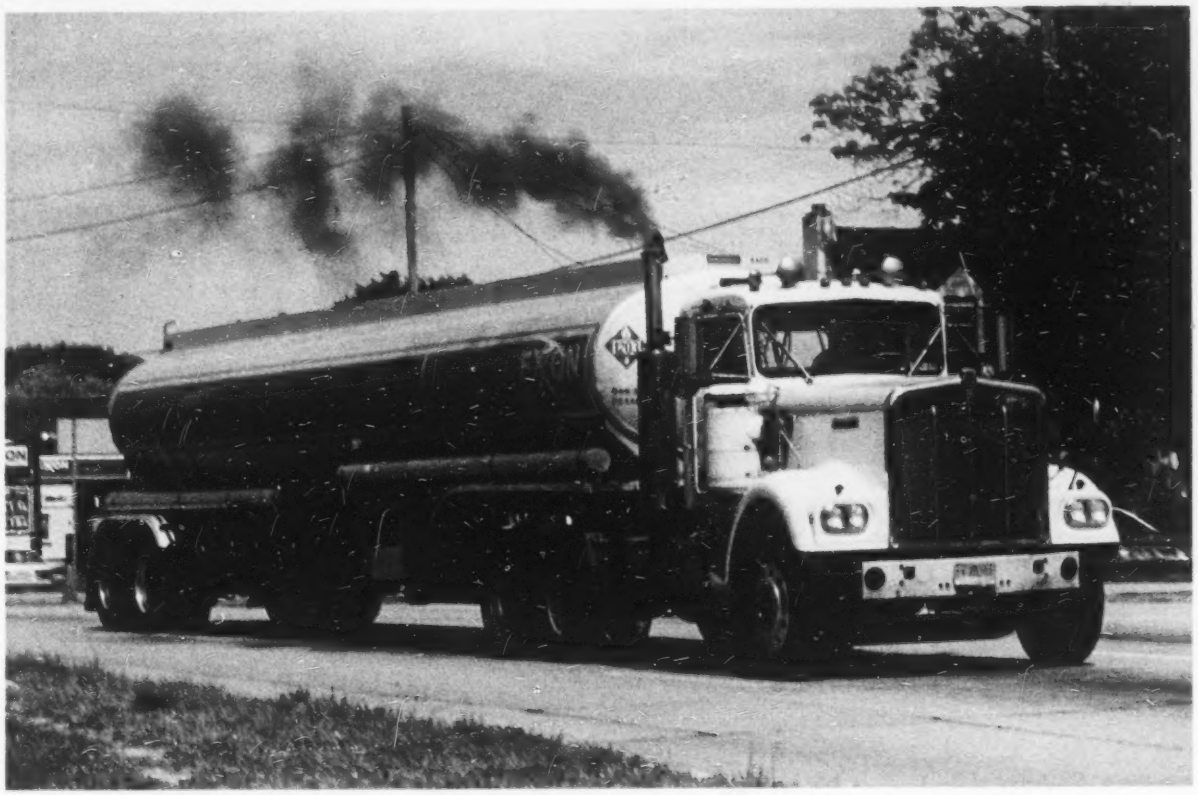

Starting on an upgrade, tractor briefly emits a plume of smoke that EPA labels as carcinogenic, like airborne asbestos. Notably, the Los Angeles Superior Court recently awarded $2 million to a mechanic who contracted lung cancer, allegedly as a result of exposure to asbestos brake linings.

domly selecting records of 2000 deceased teamsters, noting the cause of death while determining smoking habits from next of kin.

NIOSH's study may provide the industry with its first, clear indication of cancer risk by job category, but Barr argues it will not isolate the specific risk of inhaling *diesel* exhaust or *diesel* particulates.

"High concentrations of gasoline engine exhaust, as well as diesel exhaust, are found in city air and the air surrounding heavily-traveled highways," Barr says. Therefore, proving a high incidence of lung cancer among long-haul truckers, for example, may merely reflect abnormally frequent and prolonged exposure to the combined exhaust of all vehicles, he says.

EPA's standards inadequate?

In 1984, a Washington environmental lobby called Natural Resources Defense Council (NRDC) filed suit against EPA for failing to implement heavy-duty diesel particulate standards mandated by the 1977 Clean Air Act amendments. This resulted in the court ordering EPA to issue proposed standards by Oct. 15, 1984, and a final rule by March 15, 1985.

EPA complied with that timetable, imposing progressively more stringent particulate standards in 1988, 1991 and 1994. As a consequence, so-called "particulate traps" are expected to materialize on 1991-model heavy trucks.

Compliance with the 1994 standard may even require a switch to methanol fuel, according to several diesel engine makers. In general, engine makers claim EPA's standards are too strict, affording inadequate time for developing the required technology.

On May 14, 1985, NRDC again filed suit against EPA, charging the agency's particulate standards for heavy-duty diesels were too lax. NRDC's senior staff attorney, David Doniger, is demanding that EPA rewrite the standards to provide tighter controls and quicker implementation.

Doniger says dieselization is so rapid that EPA's "modest controls" only serve to hold the line on existing levels of airborne particulate. This translates to inadequate protection in future years against a significant risk of cancer which already exists, he says.

He says "no reasonable person" can deny that diesel particulate causes cancer. While the scientific community has poked holes in individual particulate studies, the collective evidence of a cancer risk is simply too overwhelming to ignore, he says. And considering the 20- to 30-year latency of lung cancer, Doniger says the trucking industry should be deeply concerned about increased fatalities in the years ahead.

R.V. Durham, safety spokesman for the Teamsters, has joined forces with NIOSH in researching the true relationship between diesel exhaust and lung cancer. Based on teamster death records released by Durham, the NIOSH study is due for completion in less than two years.

Despite NRDC's low opinion of EPA particulate standards, the agency continues its smoke-reduction efforts. On June 4, EPA administrator Lee Thomas announced plans to set standards for diesel fuel quality, initiate health-effects testing of fuel and fuel-additives, and promulgate standards for methanol-fueled vehicles.

EPA's announcement may have a significant effect on particulate control. For instance, reducing the sulfur content of diesel fuel to 0.05% from 0.4% can decrease soot by up to 36%, according to the Fuels Division of Chevron Research Company. Several states, including California, already have taken steps to limit sulfur in fuel.

In addition, researchers at the University of California-Berkeley say a barium-based fuel additive can reduce soot by up to 40%.

Regardless of potential particulate reductions by fuel controls, most engineers believe particulate traps will be necessary for heavy trucks. Significantly, the Berkeley researchers suggest that "when proposing a method for the abatement of an unwanted combustion product, it is generally important to address the question of whether the cure is worse than the problem." That admonition has direct application to particulate trap development, Barr says.

In its comments to EPA, ATA accuses the agency of ignoring potential safety problems associated with particulate traps. The truck association refers to the prospect of dangerously high trap temperature and/or dangerous trap emissions (CCJ, May 1985, page 66).

Where's the truth?

The actual health effects of diesel exhaust are obscured beneath a snowfall of literature generated by scientists, environmentalists and lobbyists. It's a snowfall that leaves trucking employees out in the cold, surrounded by bodies of countless lab animals, and wondering about their own chance of survival in what may be a hostile environment.

Judging the hostility of that environment is the goal of the NIOSH study. Pending the result of that study, however, trucking employees will have to decide for themselves if they belong on the endangered species list.

For More Information:

(1) EPA notice of proposed rulemaking on particulate emissions. *Federal Register*, October 15, 1984, beginning on page 40258.

(2) EPA final rule on particulate emissions. *Federal Register*, March 15, 1985, beginning on page 10606.

(3) "Health Effects of Exposure to Diesel Exhaust," National Academy Press, Washington, D.C., 1981.

(4) "The Research Program of the Health Effects Institute," Health Effects Institute, 215 First St., Cambridge, Mass. 02142.

• The risk of lung cancer is increased by diesel exhaust, the EPA says, which implies some degree of industry liability.

• ATA disagrees with the EPA risk assessment, citing a lack of conclusive proof.

• By conducting a study of teamster deaths, adjusted for smoking habits, NIOSH promises to resolve the controversy within two years.

Management Bottom Line

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